



# NFC

## Procedures



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# *EmpowHR* – Version 9.0 Section 15 – Person Model

TITLE I  
Payroll/Personnel Manual

CHAPTER 17  
EmpowHR

SECTION 15  
Person Model

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## Person Model

The Person Model is a term used to describe the information captured about a person and how the person is related to the organization. A person is important to an organization for many different reasons at many different times throughout their lifetime. Each relationship may require different attributes and different processing.

With the **EmpowHR** Person Model, agencies can track the personal information about the person in one place with no redundant data. The relationships that a person has to the organization are tracked in a different area of the system. For example, the user may have a person who is now an employee but was previously a contingent worker. The system tracks this person using one ID, which enables their history as a contingent worker to exist along with their history as an employee.

While **EmpowHR** is primarily a Human Resource based system, agencies may want to track people that have more than just a worker type of relationship to their organization and would also need to provide secure access to their data just as you would for a worker.

The Person Model supports the storing and tracking of three Person Types within one centralized repository. This enables the user to manage and report on all types of workers from seasonal to permanent.

The three Person Types are:

- Employee (EMP) - The relationship of a person who is hired to provide services to an organization on a regular basis in exchange for compensation and who does not provide these services as part of an independent business.
- Contingent Worker (CWR) - The relationship of a person who provides services to another entity under terms specified in a contract on a non-permanent basis such as:
  - Independent Contractors
  - Temporary Workers
  - Consultants
  - Auditors
- Person of Interest (POI) - A person who does not have an employment or a Contingent Worker relationship, but who is still of interest to the organization such as:
  - Cobra Participants
  - Pension Payees
  - External Students and Instructors
  - Volunteers

Person Model allows the user to perform the following functions:

- Create a person
- Provide a Person checklist

- Create organizational relationships
- Create worker organizational relationships and instances
- Provide additional assignment or new instance option
- Provide instance dates versus assignment dates
- Promote an assignment to an instance
- Review a person's organizational relationships

This section includes the following topics:

[Add A Person](#)

**Modify A Person**

**Adding A Disability**

**Adding Identification Data**

**Viewing Person Data**

**Security**

**Search**

**Contract Administration**

**Configure Checklist**

**Configure Person of Interest Types**

## Add A Person

The Add a Person component requires a person ID. There are two ways to assign an ID :

- Automatic ID assignment allows the system to generate ID's sequentially as new people are added.

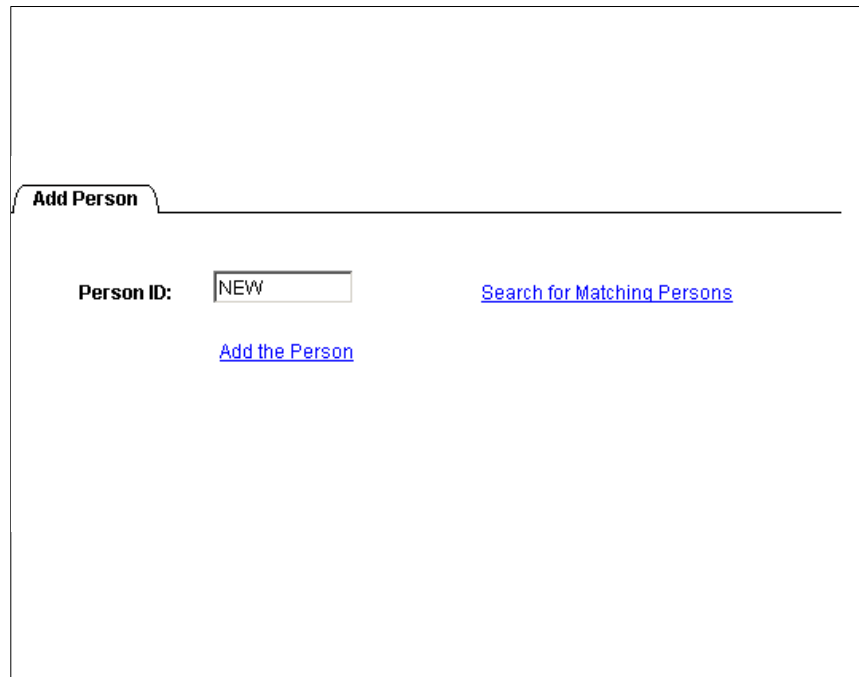
**OR**

- Manual ID assignment allows the user to enter the IDs, using any system that they choose for the organization. Assigning IDs manually is the only way that the user can include alphabetical characters in the IDs.

**Note:** To avoid maintaining two different sets of IDs, it is recommended that the user use only one method.

**To add a person:**

1. Select the **Workforce Administration** menu group.
2. Select the **Personal Information** menu.
3. Select the **Biographical** menu item.
4. Select the **Add A Person** component. The Add A Person tab page (**Figure 1**) is displayed.



**Figure 1. Add A Person tab page**

5. Complete the field as follows:

## Person ID

This field is populated with the system-assigned ID when you are adding a new person. The value will display as **New** until the record is saved.

- Click the **Add the Person** link. The Biographical Details tab - Add A Person(**Figure 2**) is displayed.

The screenshot displays the 'Biographical Details' tab in the 'Add A Person' page. The 'Person ID' is 'NEW'. The 'Name' section includes fields for \*Effective Date (02/06/2009), \*Format Type (English), and Display Name, with an 'Add Name' link. The 'Biographic Information' section includes Date of Birth (0 Years 0 Months), Birth Country (USA), Birth State, and Birth Location, with a 'Waive Data Protection' checkbox. The 'Biographical History' section includes \*Effective Date (02/06/2009), \*Gender (Unknown), \*Highest Education Level ((Invalid Value)), \*Marital Status (Unknown), Language Code, and Alternate ID, with a 'Full-Time Student' checkbox. The 'National ID' section shows a table with columns for Country, National ID Type, National ID, and Primary ID. The bottom navigation bar includes buttons for Save, Notify, Previous tab, Next tab, Refresh, Add, Update/Display, Include History, and Correct History.

Figure 2. Biographical Details tab - Add A Person page

- Complete the fields as follows:

## Person ID

This field is populated with the system-assigned ID when you are adding a new person. The value will display as **New** until the record is saved. If the Person ID was entered manually, the page field displays the value that was entered.

## \*Effective Date

Enter the effective date of the action or select a date by clicking the calendar icon.

## \*Format Type

This field defaults to **English**. To change, select a format type from the drop-down list.

## Display Name

This field is populated with data entered from the **Add Name** link. See field instructions for [Add a Name](#).

<b>Date of Birth</b>	Enter the persons date of birth or select a date by clicking the calendar icon. The calculated age is displayed to the right of the field. If this field is left blank, a warning message appears when the record is saved. The date of birth is not required, however; this information is used to calculate a person's age in some benefit and payroll tasks. It also calculates dates, such as the expected retirement date, based on the person's age.
<b>Birth Country</b>	Enter the birth country or select a country by clicking the search icon. Based on the selected country, the system might display additional fields.
<b>Birth State</b>	Enter the birth state or select a state by clicking the search icon.
<b>Birth Location</b>	Enter the birth location. Usually a city, town, or village.
<b>Waive Data Protection</b>	Check this box if the employee's consent to share personal data with users in other European Union member nations is obtained. European community employment and personal privacy legislation specifies that personnel information can't be passed across countries in the European Union without authorization from the employee.
<b>*Effective Date</b>	Enter the effective date or select a date by clicking the calendar icon.
<b>*Gender</b>	Select the applicable gender from the drop-down list. Valid values are <b>Male</b> , <b>Female</b> , and <b>Unknown</b> .



**\*Highest Education Level** Select the applicable education level from the drop-down list. The valid values are as follows:

**Highest Education Level Valid Values**

1-Yr College  
2-Yrs College  
3-Yrs College  
6th-Yr Degree  
Associate Degree  
Bachelor's Degree  
Compl Terminal Occupational Pg  
Doctorate Degree  
Elementary School Completed  
First Professional  
HS Graduate or Equivalency  
Master's Degree  
No Formal Education  
Post 6th-Yr Degree  
Post - Bachelor's Work  
Post - Doctorate Work  
Post - First Professional  
Post - Master's Work  
Some College  
Some HS - Didn't Graduate  
Some Terminal Occupational Prg

**\*Marital Status** Select the applicable marital status. The valid values are as follows:

**Marital Status Valid Values**

Common-Law  
Divorced  
Head of Household  
Married  
Not Applicable  
Separated  
Single  
Unknown  
Widowed

**As Of** Enter the date or select a date by clicking on the calendar icon.

<b>Language Code</b>	<p>Select the person's native or preferred language from the drop-down list. The valid values are as follows:</p> <p><b>Language Code Valid Values</b></p> <p>Can French</p> <p>Danish</p> <p>Dutch</p> <p>English</p> <p>French</p> <p>German</p> <p>Greek</p> <p>Intl Eng</p> <p>Italian</p> <p>Japanese</p> <p>Korean</p> <p>Portuguese</p> <p>S Chinese</p> <p>Spanish</p> <p>Swedish</p> <p>T Chinese</p> <p>Thai</p> <p><b>Note:</b> Do not use this field to record the organization's official language or to rate a worker's proficiency in speaking, reading, or writing various languages.</p>
<b>Alternate ID</b>	Enter the alternate ID if the use of a second type of ID is applicable.
<b>Full-Time Student</b>	Check this box if the person is a full-time student.
<b>*Country</b>	Select the country from the drop-down list that issued the worker's national ID.
<b>National ID Type</b>	This field defaults to Social Security Number and cannot be changed.
<b>National ID</b>	Enter the Social Security Number.
<b>Primary ID</b>	Check this box if this ID is the person's primary ID. If this is the only data row for this person, the box is checked by default.

8. Select the Contact Information tab. The Contact Information tab - Add A Person page (Figure 3) is displayed.

Figure 3. Contact Information tab - Add A Person page

9. Complete the fields as follows:

**Person ID**

This field is populated with the system-assigned ID when you are adding a new person. The value will display as **New** until the record is saved.

**Address Type**

Select the type of address that appears in this row. The field is populated with **Home** for the first address entered. Click + to select additional address types and add additional addresses. Valid Values are as follows:

**Address Type Valid Values**

Billing  
Business  
Campus  
Check  
Dormitory  
Legal  
Mailing  
Other  
Other 2  
Permanent  
Preferred  
Veteran

<b>As Of</b>	This field is populated with the information entered from the <b>Add Address Detail</b> link. Refer to field instructions below.
<b>Status</b>	This field is populated with the information entered from the <b>Add Address Detail</b> link. Refer to Add Address Detail.
<b>Address</b>	This field is populated with the information entered from the <b>Add Address Detail</b> link. Refer to Add Address.
<b>*Phone Type</b>	<p>Select the applicable phone type that corresponds with the telephone number. Select <b>Main</b> to designate a phone number as the individual's primary contact number. The valid values are as follows:</p> <p><b>Phone Type Valid Values</b></p> <p><b>Business</b></p> <p><b>Campus</b></p> <p><b>Dormitory</b></p> <p><b>FAX</b></p> <p><b>Home</b></p> <p><b>Main</b></p> <p><b>Mobile</b></p> <p><b>Other</b></p> <p><b>Pager 1</b></p> <p><b>Pager 2</b></p> <p><b>Telex</b></p>
<b>Telephone</b>	Enter the telephone number.
<b>Extension</b>	Enter the extension if applicable.
<b>Preferred</b>	Check this box if this is the person's preferred phone number.

**\*Email Type**

Select the email type from the drop-down list. Click + to select additional email address types and add additional email addresses. The valid values are as follows:

**Email Type Valid Values**

**Blackberry**

**Business**

**Campus**

**Dorm**

**Home**

**Other**

**\*Email Address**

Enter the email address.

**Preferred**

Check this box if this is the person's preferred email address.

10. Select the Regional tab. The Regional tab - Add A Person page (**Figure 4**) is displayed.

The screenshot displays the 'Regional' tab in the 'Add A Person' interface. At the top, there are four tabs: 'Biographical Details', 'Contact Information', 'Regional' (which is active), and 'Organizational Relationships'. Below the tabs, the 'Person ID' is shown as 'NEW'. The main content area is divided into three sections: 'Ethnic Group', 'History', and 'Smoker History'. The 'Ethnic Group' section includes a 'Regulatory Region' dropdown menu currently set to 'USA', a search icon, and an 'Ethnic Group' dropdown menu. The 'History' section contains several input fields: 'Effective Date', 'Date Entitled to Medicare', 'Military Status' (a dropdown menu), 'Citizenship (Proof 1)', and 'Citizenship (Proof 2)', along with a checkbox labeled 'Eligible to Work in U.S.'. The 'Smoker History' section features a table with two columns: 'Smoker' and 'As of'. At the bottom of the page, there is a row of buttons: 'Save', 'Notify', 'Previous tab', 'Next tab', 'Refresh', 'Add', 'Update/Display', 'Include History', and 'Correct History'.

**Figure 4. Regional tab - Add A Person page**

11. Complete the fields as follows:

**Person ID**

This field is populated with the system-assigned ID when you are adding a new person. The value will display as **New** until the record is saved.

<b>Regulatory Region</b>	Enter the regulatory region or select a region by clicking the search icon.
<b>Ethnic Group</b>	Enter the ethnic group or select a group by clicking the search icon.
<b>Primary</b>	Check this box if applicable.
<b>Effective Date</b>	Enter an effective date or select a date by clicking on the calendar icon.
<b>Date Entitled To Medicare</b>	Enter a date or select a date by clicking on the calendar icon on which this person is entitled to receive Medicare coverage.
<b>Military Status</b>	<p>Select a military status from the drop-down list. The valid values are as follows:</p> <p><b>Military Status Valid Values</b></p> <p>Not a Veteran</p> <p>Not a Vietnam-Era Veteran</p> <p>Post-Vietnam-Era Veteran</p> <p>Pre-Vietnam-Era Veteran</p> <p>Vietnam-Era Veteran</p>
<b>Citizenship (Proof 1)</b>	Enter the first form of identification (for example: passport, Social Security card, etc.) to prove U.S. citizenship.
<b>Citizenship (Proof 2)</b>	Enter the second form of identification (for example: passport, Social Security card, etc.) to prove U.S. citizenship.
<b>Eligible To Work In U.S.</b>	Check this box if the person is eligible to work in the U.S.
<b>*Smoker</b>	Select the applicable answer from the drop-down list. The valid values are <b>No</b> and <b>Yes</b> .
<b>*As Of</b>	Enter the applicable date or select a date by clicking on the calendar icon on which the person started smoking.

12. Select the Organizational Relationships tab. The Organizational Relationships tab - Add A Person page (**Figure 5**) is displayed.

The screenshot shows the 'Organizational Relationships' tab selected. The form contains the following elements:

- Tabs: Biographical Details, Contact Information, Regional, **Organizational Relationships**
- Person ID: NEW
- Section: Choose Org Relationship to Add
- Form fields:
  - ☐ Employee
  - ☐ Contingent Worker
  - ☐ Person of Interest
  - Checklist Code: [Text Field]
  - Empl Rcd Nbr: [Dropdown]
- Action: Add the Relationship (Button)
- Link: [Go to Person Checklist](#)
- Toolbar: Save, Notify, Previous tab, Next tab, Refresh, Add, Update/Display, Include History, Correct History

**Figure 5. Organizational Relationships tab - Add A Person page**

13. Click **Save** to save the new person.
14. At this point you must establish the organizational relationship of the new person. To establish the organizational relationship, see [Establishing the Organizational Relationship](#).

Step	Description
Check the <b>Employee</b> box	To establish an employee relationship.
Check the <b>Contingent Worker</b> box	To establish a contingent worker relationship.
Check the <b>Person of Interest</b> box	To establish a person of interest relationship.

## Establishing a Relationship

Only one organizational relationship can be selected when creating the Personal Data record. Additional relationships can be created directly from the New Employment Instance, New Contingent Worker Instance, Add Person of Interest Job and Add a POI type to a person components.

If a person is created without a job data record or POI type record, the system will save the person as a POI without job with a POI Type of Unknown. When a record is created and saved for that person on the Add an Employment Instance component, Add a Contingent Worker component, Add a POI Instance component, or Add a POI Reltn. component, the system will delete the Unknown POI without job instance for that person.

This section contains the following topics:

[Employee](#)

[Contingent Worker](#)

[Person Of Interest](#)

## ***Employee***

### **To Add an Employee:**

1. Check the ***Employee*** box.
2. Complete the fields as follows:

**Person ID**

This field is populated with the system-assigned ID when adding a new person. The value will display as **New** until the record is saved.

**Empl Rcd Nbr**

This field is populated with the next employee record number available for the person.



## Checklist Code

Select the applicable checklist code from the drop-down menu to create a checklist for the person. The valid values are:

### Checklist Code Valid Values

Applicant Checklist  
 Applicant Checklist  
 Applicant Checklist  
 Applicant Checklist  
 Applicant Hire Checklist  
 Applicants' Checklist UK  
 Credentialing for Health Care  
 Domestic Loan Assgnmnt Chcklst  
 Domestic Loan Assgnmnt Chcklst  
 Foreign Loan Arrival Chcklst  
 Foreign Loan Departure Chcklst  
 Foreign Loan Host Checklist  
 Foreign Srvc Arrival Checklist  
 Foreign Srvc Departure Chklst  
 Foreign Srvc Host Checklist  
 Hire  
 Immunization Checklist  
 Local Co Govt New Hire Chcklst  
 Netherlands Monitor Absences  
 New Hire Checklist  
 Pre-Employment Checklist  
 Reptraition Checklist  
 Reptraition Checklist  
 Termination  
 Termination Checklist  
 Transfer

3. Click the **Go To Person Checklist** to create a checklist for the person. The Person Checklist page is displayed. For more information see Person Checklist.
4. Click **Add the Relationship** to save the data and establish the new person's organizational relationship. The Data Control tab - Add Employee page (**Figure 6**) is displayed. For more information on PAR Processing, refer to Chapter 17, Section 5.

The screenshot shows the 'Data Control' tab in the EmpowHR system. At the top, there are tabs for Personal Data, Job, Position, Compensation, Employment 1, Employment 2, and Benefit Data. The 'Employment 1' tab is selected. The form displays the following fields and controls:

- Header:** Last, First; EmplID: 000005; Empl Rcd Nbr: 0
- Data Control Section:**
  - Effective Date: 02/09/2009 (with a calendar icon)
  - Proposed Effective Date: (empty)
  - Effective Seq: (empty)
  - Auth Date: 07/07/2009 (with a calendar icon)
  - Contact Emplid: (empty)
  - \*Action: HIR (dropdown menu)
  - \*Reason Code: (empty)
  - NOA Code: (empty)
  - Authority (1): (empty)
  - Authority (2): (empty)
  - NTE Date: (empty)
  - PAR Request #: (empty)
  - PAR Status: PRO (dropdown menu)
  - Agency Type: Federal (dropdown menu)
  - Transaction Status: InProgress (dropdown menu)
- Buttons and Links:**
  - Print SF-52
  - Print SF-50
  - Add Attachment
  - PAR Remarks
  - Award Data
  - Tracking Data
  - Justification
  - GPPA Website
- Footer:** Save, Notify, Previous tab, Next tab, Add

Figure 6. Data Control tab - Add An Employee page

## Contingent Worker

To add a Contingent Worker or a Person of Interest with job data:

1. Check the **Contingent Worker** box.
2. Complete the fields as follows:

### Person ID

This field is populated with the system-assigned ID when adding a new person. The value will display as **New** until the record is saved.

### Empl Rcd Nbr

This field is populated with the next employee record number available for the person.

## Checklist Code

Select the applicable checklist code from the drop-down list to create a checklist for the person. The valid values are:

### Checklist Code Valid Values

Applicant Checklist  
 Applicant Checklist  
 Applicant Checklist  
 Applicant Checklist  
 Applicant Hire Checklist  
 Applicants' Checklist UK  
 Credentialing for Health Care  
 Domestic Loan Assgnmnt Chcklst  
 Domestic Loan Assgnmnt Chcklst  
 Foreign Loan Arrival Chcklst  
 Foreign Loan Departure Chcklst  
 Foreign Loan Host Checklist  
 Foreign Srvc Arrival Checklist  
 Foreign Srvc Departure Chklst  
 Foreign Srvc Host Checklist  
 Hire  
 Immunization Checklist  
 Local Co Govt New Hire Chcklst  
 Netherlands Monitor Absences  
 New Hire Checklist  
 Pre-Employment Checklist  
 Reptraition Checklist  
 Reptraition Checklist  
 Termination  
 Termination Checklist  
 Transfer

3. Click **Add the Relationship**. The Work Location tab - Contingent Worker page (Figure 7) is displayed.

Figure 7. Work Location tab - Contingent Worker page

4. Complete the fields as follows:

- |                        |  |
|------------------------|--|
| <b>ID</b>              | This field is populated.   |
| <b>Empl Rcd #</b>      | This field is populated with the employee record number for the person.  |
| <b>HR Status</b>       | This field is populated.   |
| <b>Job Status</b>      | This field is populated.   |
| <b>*Effective Date</b> | Enter the effective date or select a date by clicking the calendar icon. When a new instance with the action of Hire is added, the effective date entered becomes the hire and original hire date.   |
| <b>Sequence</b>        | Use this number to track multiple administrative actions that occur on the same day. The default value is 0, the correct number for new instances.   |
| <b>*Job Indicator</b>  | Select the applicable job indicator from the drop-down list. The valid values are <b>Primary Job</b> , <b>Secondary Job</b> , and <b>Not Applicable</b> . This field is used to process people with more than one organizational instance in a single organizational relationship. |

<b>*Action</b>	Select the action requiring you to create or modify this record from the drop-down menu. The system displays a default value when a new employment, contingent worker, or POI instance is created.
<b>Reason</b>	Select the reason requiring you to create or modify this record from the drop-down menu. The system displays a default value when a new employment, contingent worker, or POI instance is created. Valid values are
<b>Last Start Date</b>	Enter the most recent start date for this organizational instance.
<b>Termination Date</b>	This field is populated with the day before the termination effective date.
<b>Expected Job End Date</b>	<p>Enter the expected job end date for this job or select a date by clicking on the calendar icon.</p> <p>If this job is a temporary assignment and a date is not entered here, a Temporary Assignment without End Date report can be ran to identify those assignments that do not have an end date. This date is necessary if you want the system to terminate this job and reactivate any substantive job that may be on hold.</p> <p>The system displays the day before the termination effective date as the termination date.</p>
<b>Position Entry Date</b>	This field is populated with the effective date based on the position number entered for this person. The data can be overridden by clicking <b>Override Position Data</b> .

<b>Position Number</b>	<p>Enter the position number or select a number by clicking on the search icon.</p> <p>Define positions in the Add/Update Position Info component. Completing this field allows the system to complete position-related fields in the Job Data component with default data from the Add/Update Position Info Component, including job code, department, location, supervisor level, reports to, and full- or part-time status. The corresponding fields become unavailable for entry.</p> <p>A warning message will appear if a person is assigned to a position that is already filled and if the new appointment exceeds the maximum headcount for that position. The system calculates the headcount and displays the appropriate indicator in the Open//Filled field in the Add/Update Position Info component when assignments are changed.</p>
<b>Position Management Record</b>	<p>This box is selected when changes are made to fields in the Add/Update Position info component that initiate a system update of fields here. When this box is selected it indicates that the system inserts a data row on the Job Data pages.</p>
<b>*Regulatory Region</b>	<p>This field is populated based on the regulatory region specified for the position this person is associated with. The data can be overridden by clicking <b>Override Position Data</b>.</p> <p>If the pers is not assigned to a position, this field is populated with the regulatory region for the person, based on the user preferences. This entry can be overridden.</p>
<b>*Company</b>	<p>This field is populated based on the company specified for the position associated with this person and cannot be modified. The data can be overridden by clicking <b>Override Position Data</b>.</p> <p>This field is populated with a default company code if the person is not assigned to a position, but a company is assigned to a department in the department table.</p> <p>If no company is designate on the Department tabe, enter a company or select a company by clicking the search icon.</p>

<b>*Business Unit</b>	<p>This field is populated based on the business unit specified for the position associated with this person and cannot be modified. The data can be overridden by clicking <b>Override Position Data</b>.</p> <p>This field is populated with a default business unit if the person is not assigned to a position. The default can be overridden.</p>
<b>Department Entry Date</b>	This field is populated.
<b>*Department</b>	This field is populated based on the position number entered.
<b>Location</b>	This field is populated based on the position number entered.
<b>Establishment ID</b>	Enter the establishment ID or select an ID by clicking on the search icon.
<b>Date Created</b>	This field is populated.

5. Click **Calculate Status and Dates** to calculate the person's HR, job, or payroll status and the employment dates so that the changes can be reviewed before the component is saved. This button is displayed when changes are made to the effective date or one or the status fields.

6. Click **Override Position Data** to enter exceptions to the default position data for this person. This opens up the unavailable fields, including Job Code and Department, and entries in those fields can be overridden. For example, the worker might have a higher salary grade than the standard grade that is associated with the position. When **Override Position Data** is clicked, the button becomes **Use Position Data**, and vice versa. This button is available only on new rows of data.

**Note:** If the defaults for position-related data are overridden, the employee data must be maintained manually; the system doesn't update the position data on the Job Data pages with data from the Add/Update Position Info component unless **Use Position Data** is clicked.

7. Click the **Job Information** tab. The Job Information tab - Contingent Worker page (**Figure 8**) is displayed.

Work LocationJob InformationJob LaborPayrollSalary PlanCompensation

Jane DoeCWRID: 0040Empl Rcd #: 0

Job Information

Effective Date: 03/02/1980Effective Sequence: 0Job Indicator: Primary JobGo To Row

Action: Add CWRReason:Current

\*Job Code:

Supervisor Level:

Reports To:

\*Regular/Temporary: Regular

Empl Class:

\*Regular Shift: N/A

Entry Date:

\*Full/Part: Full-Time

\*Officer Code: None

Shift Rate:

Shift Factor:

Standard Hours

Standard Hours: 40.00

Work Period: B Biweekly

FTE: 0.000000

Contract #

Contract Number:

Contract Type:

Next Contract Number

USA

\*FLSA Status: (Invalid Val)\*EEO Class: NoneWork Day Hours:

Job Data

Employment Data

Earnings Distribution

Benefits Program Participation

OK

Cancel

Apply

Previous tab

Next tab

Refresh

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

Figure 8. Job Information tab - Contingent Worker page

8. Complete the fields as follows:

- ID

This field is populated.
- Empl Rcd #

This field is populated with the employee record number for the person.
- Effective Date

This field is populated based on the data selected on the Work Location tab.
- Effective Sequence

This field is populated.
- Job Indicator

This field is populated based on the data selected on the Work Location tab.
- Action

This field is populated based on the data selected on the Work Location tab.
- Reason

This field is populated based on the data selected on the Work Location tab.



**\*Job Code**

This field is populated based on the job code specified for the position associated with this person, the system enters a default job code and cannot be modified. The data can be overridden by clicking **Override Position Data** on the work Location tab.

If the person is not assigned to a position, enter the job code or select a code by clicking the search icon.

**Note:** If this person is attached to a labor agreement on the Job Labor tab and that labor agreement is associated with job codes, a job code that is valid for the labor agreement must be selected.

**Entry Date**

This field is populated with the date on which the person is first assigned to this job code. If you are using position management, this field cannot be modified. The data can be overridden by clicking **Override Position Data** on the work Location tab.

**Supervisor Level**

Supervisor levels are a class of position that represent levels of some managerial or supervisory significance and can be used as another type of employee identifier.

If a specified supervisor level of this position is associated with this person, the system enters a default supervisor level and this field cannot be modified. The data can be overridden by clicking **Override Position Data** on the work Location tab.

If the person is not assigned to a position, enter the supervisor level or select a level by clicking the search icon.

**Reports To**

This field displays the position number, title, and name of the manager associated with this position.

If a specified reports to number for this position is associated with this person, the system enters a default value and this field cannot be modified. The data can be overridden by clicking **Override Position Data** on the work Location tab.

If this person is not assigned to a position and is assigned a reports to ID to a department in the ?Department Table, a default reports to ID appears.

If the person is not assigned to a position, enter the reports to ID or select an ID by clicking the search icon.

**\*Regular/Temporary**

This field is populated based on the position number entered or selected and cannot be modified. The data can be overridden by clicking **Override Position Data** on the work Location tab.

**\*Full/Part**

This field is populated based on the position number entered or selected and cannot be modified. The data can be overridden by clicking **Override Position Data** on the work Location tab.

If the person is not assigned to a position, select the applicable value from the drop-down menu. The valid values are **Full-time** and **Part-time**.

**Empl Class**

Select the employee class from the drop down list. The valid values are:

**Empl Class Valid Values**

Agency/Tmp

Apprentice

Assignee

Consultant

Contractor

Expatriate

Intern

N/A

Trainee

**\*Officer Code**

Select the Officer Code from the drop down list. The valid values are:

**Officer Code Valid Values**

Chairman

Director

None

Officer

President

Secretary

Treasurer

Vice Presi

**\*Regular Shift**

This field is populated based on the position number associated with the person and cannot be modified. The data can be overridden by clicking **Override Position Data** on the work Location tab.

Select the appropriate shift if the worker is working shifts. If the worker does not work shifts, leave the Shift Rate and Factor fields blank. The default value is **N/A**.

**Shift Rate**

Enter the Shift Rate information.

<b>Shift Factor</b>	Enter the Shift Factor information.
<b>Standard Hours</b>	Enter the number of standard hours.
<b>Work Period</b>	Enter the Work Period or select a work period by clicking on the search icon.
<b>FTE</b>	Enter the FTE information.
<b>Contract Number</b>	Enter the contact number or select a number by clicking the search icon.
<b>Contract Type</b>	This field is populated information that corresponds with contract number entered or selected.
<b>FLSA Status</b>	Select the FLSA status from the drop down list. The valid values are <b>Exempt</b> and <b>Nonexempt</b> . This field defaults to <b>(Invalid Value)</b> .
<b>*EEO Class</b>	Select the EEO class from the drop down list. The valid values are: <b>Exclude</b> <b>None</b> <b>Pr Trainee</b> <b>WC Trainee.</b>
<b>Work Day Hours</b>	Enter the work day hours.

9. Click the **Job Labor** tab. The Job Labor tab - Contingent Worker page (**Figure 9**) is displayed.

Work LocationJob InformationJob LaborPayrollSalary PlanCompensation

JANE DOE      CWR      ID: 0033      Empl Rcd #: 0

Labor Information

FindFirst1 of 1Last

Effective Date: 03/09/2009      Effective Sequence: 0      Job Indicator: Primary Job      Go To Row

Action: Add CWR      Reason:      Current

Bargaining Unit:      Labor Agreement:      Labor Agreement Entry Dt:      Stop Wage Progression

Employee Category:      Employee Subcategory:      Pay Union Fee

Employee Subcategory 2:      Union Code:      Position Management Record

Works Council ID:      Union Seniority Date:      Labor Facility Entry Date:      Exempt from Layoff      Layoff Exemption Reason:      Recalculate Seniority Dates

Assigned Seniority Dates

CustomizeFindView AllFirst1 of 1Last

Seniority Date	Control Value	Labor Seniority Date	Override	Override Reason

OKCancelApplyPrevious tabNext tabRefresh

Work LocationJob InformationJob LaborPayrollSalary PlanCompensation

Figure 9. Job Labor tab - Contingent Worker page

10. Complete the fields as follows:

ID

This field is populated.

Empl Rcd #

This field is populated with the employee record number for the person.

Effective Date

This field is populated based on the data selected on the Work Location tab.

Effective Sequence

This field is populated.

Job Indicator

This field is populated based on the data selected on the Work Location tab.

Action

This field is populated based on the data selected on the Work Location tab.

Reason

This field is populated based on the data selected on the Work Location tab.

Bargaining Unit

Enter the bargaining unit to which the employee belongs or select a unit by clicking on the search icon.

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<b>Labor Agreement</b>	Enter the labor agreement that applies to this worker or select an agreement by clicking on the search icon.
<b>Labor Agreement Entry Dt</b>	If this worker is part of a national labor agreement, enter the labor agreement entry date or select a date by clicking the calendar icon.
<b>Employee Category</b>	Enter the employee category to which the worker belongs under the labor agreement or select a category by clicking on the search icon.
<b>Stop Wage Progression</b>	Check this box if the selected job code is associated with a wage progression salary plan. The system will not accumulate hours towards a wage progression step for this worker. To resume wage progression, insert a new Job Data row and clear this check box.
<b>Employee Subcategory</b>	If the employee category selected for this person contains subcategories, this field appears. Enter the employee subcategory or select a subcategory by clicking on the search icon.
<b>Pay Union Fee</b>	Check this box if a union fee should be paid.
<b>Employee Subcategory 2</b>	If the employee subcategory selected for this person contains secondary subcategories, this field appears. Enter the second employee subcategory or select a second subcategory by clicking on the search icon.
<b>Position Management Record</b>	This field is populated whenever the system inserts this data by updating the incumbent to reflect user-made changes to the Position Management component.
<b>Union Code</b>	This field is populated based on the position number associated with a person and cannot be modified. The data can be overridden by clicking <b>Override Position Data</b> on the work Location tab.
<b>Union Seniority Date</b>	Enter the date on which the worker enters the union.
<b>Works Council ID</b>	Select the ID of the Works Council representing this employee.

<b>Labor Facility ID</b>	Enter the facility that this worker belongs to or select an ID by clicking on the search icon.
<b>Labor Facility Entry Date</b>	Enter the date the worker began in the labor facility or select a date by clicking on the calendar icon.
<b>Exempt From Layoff</b>	Check this box if the worker is exempt from layoff.
<b>Layoff Exemption Reason</b>	Enter the layoff exemption reason or select a reason by clicking on the search icon.
<b>Seniority Date</b>	Enter the seniority date or select a date by clicking the calendar icon.
<b>Control Value</b>	
<b>*Labor Seniority Date</b>	
<b>Override</b>	
<b>Override Reason</b>	

11. Click **Recalculate Seniority Dates** to recalculate seniority dates as needed.
12. Click the **Payroll** tab. The Payroll tab - Contingent Worker page (**Figure 9**) is displayed.

The screenshot shows the 'Payroll' tab for employee Jane Doe (ID: 180654, Empl Rcd #: 0). The 'Payroll Information' section includes fields for Effective Date (03/26/2009), Effective Sequence (0), Job Indicator (Primary Job), Action (Add CWR), and Reason. Below this is the 'Payroll System' dropdown set to 'Other'. A section titled 'Other Payroll System' contains fields for Pay Group, Pay Type, Tax Location Code, GL Pay Type, Combination Code, Holiday Schedule, Tipped, and FICA Status. At the bottom, there are navigation buttons (OK, Cancel, Apply, Previous tab, Next tab, Refresh) and a breadcrumb trail: Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation.

**Figure 10. Payroll tab - Contingent Worker page**

**13. Complete the fields as follows:**

- |                           |  |
|---------------------------|--|
| <b>ID</b>                 | This field is populated.   |
| <b>Empl Rcd #</b>         | This field is populated with the employee record number for the person.      |
| <b>Effective Date</b>     | This field is populated based on the data selected on the Work Location tab. |
| <b>Effective Sequence</b> | This field is populated.   |
| <b>Job Indicator</b>      | This field is populated based on the data selected on the Work Location tab. |
| <b>Action</b>             | This field is populated based on the data selected on the Work Location tab. |
| <b>Reason</b>             | This field is populated based on the data selected on the Work Location tab. |

<b>*Payroll System</b>	<p>Select the payroll system that is used to process this person's paycheck from the drop-down list. The valid values are:</p> <p><b>Payroll System Valid Values</b></p> <p>Global Payroll</p> <p>Other</p> <p>Payroll Interface</p> <p>Payroll for North America</p>
<b>Pay Group</b>	<p>Enter the pay group or select a group by clicking the search icon.</p>
<b>Holiday Schedule</b>	<p>Enter the holiday schedule or select a schedule by clicking the search icon. If the user defined a default holiday schedule for the employee's location, the system displays it here. If the holiday schedule is left blank on the Location Profile page and the user entered a default on the Pay Group table, the system displays it here.</p>
<b>Pay Type</b>	<p>Enter the pay type or select a type by clicking on the search icon. This value depends on the pay group. The system completes the field with the default value from the Pay Group table. If a pay type doesn't exist for this pay group, establish one in the Pay Group table.</p>
<b>Tipped</b>	<p>Select the tipped information from the drop-down list. The valid values are:</p> <p>Directly</p> <p>Indirectly</p> <p>Not Tipped.</p>
<b>Tax Location Code</b>	<p>Enter the tax location code or select a code by clicking on the search icon.</p>
<b>FICA Status</b>	<p>Select the FICA status from the drop-down list. The valid values are:</p> <p>Exempt</p> <p>Medicare Only</p> <p>Subject.</p>
<b>GL Pay Type</b>	
<b>Combination Code</b>	



- 14. Click the **Edit Chart Fields** link to access the ChartField common component for selecting ChartField values.
- 15. Click the **Salary Plan** tab. The Salary tab - Contingent Worker page (**Figure 9**) is displayed.

The screenshot shows the 'Salary Plan' tab in the EmpowHR system. At the top, there are tabs for 'Work Location', 'Job Information', 'Job Labor', 'Payroll', 'Salary Plan', and 'Compensation'. The 'Salary Plan' tab is selected. Below the tabs, the employee's name 'JANE DOE' and job type 'CWR' are displayed. To the right, the 'ID' is '0033' and 'Empl Rcd #' is '0'. A 'Salary Plan' section contains a table with one row showing 'Effective Date: 03/09/2009', 'Effective Sequence: 0', 'Job Indicator: Primary Job', and 'Action: Add CWR'. Below this table are fields for 'Salary Administration Plan', 'Includes Wage Progression Rule', 'Grade', 'Step', 'Grade Entry Date', and 'Step Entry Date'. At the bottom of the page are buttons for 'OK', 'Cancel', 'Apply', 'Previous tab', 'Next tab', and 'Refresh'.

Figure 11. Salary Plan tab - Contingent Worker page

- 16. Complete the fields as follows:
  - ID** This field is populated.
  - Empl Rcd #** This field is populated with the employee record number for the person.
  - Effective Date** This field is populated based on the data selected on the Work Location tab.
  - Effective Sequence** This field is populated.
  - Job Indicator** This field is populated based on the data selected on the Work Location tab.
  - Action** This field is populated based on the data selected on the Work Location tab.

Reason	This field is populated based on the data selected on the Work Location tab.
Salary Administration	This field is populated based on the position number associated with a person. To modify this field, enter the salary administration or select an administration by clicking the search icon.
Grade	Enter the grade or select a grade by clicking the search icon.
Grade By Entry Date	Enter the date on which the person first joint this grade or select a date by clicking the calendar icon.
Includes Wage Progression Rule	This field is populated if the salary plan administration plan selected includes wage progression.
Step	Enter the step or select a step by clicking the search icon.
Step Entry Date	Enter the date on which the person first jointed this step or select a date by clicking the calendar icon.

17. Click the **Compensation** tab. The Compensation tab - Contingent Worker page (**Figure 9**) is displayed.

Work LocationJob InformationJob LaborPayrollSalary PlanCompensation

Jane DoeCWRID: 0040Empl Rcd #: 0

Compensation

FindFirst1 of 1Last

Effective Date: 03/02/1980Effective Sequence: 0Job Indicator: Primary JobGo To Row

Action: Add CWRReason:

Current

Compensation Rate: 0.00USD\*Frequency: BBiweekly

Comparative Information

Change Amount: 0.000000USD BiweeklyCompa-Ratio:

Change Percent: 0.000

Pay Rates

USDUSD

USDUSD

Default Pay ComponentsContract Change Prorate Option

Pay Components

CustomizeFindFirst1 of 1Last

AmountsControlsChangesConversion

Rate Code	Seq	Comp Rate	Currency	Frequency	Points	Percent	Rate Code Group
1	0						

Calculate Compensation

Job DataEmployment DataEarnings DistributionBenefits Program Participation

OKCancelApplyPrevious tabNext tabRefresh

Work LocationJob InformationJob LaborPayrollSalary PlanCompensation

Figure 12. Compensation tab - Contingent Worker page

18. Complete the fields as follows:

<b>ID</b>	This field is populated.
<b>Empl Rcd #</b>	This field is populated with the employee record number for the person.
<b>Effective Date</b>	This field is populated based on the data selected on the Work Location tab.
<b>Effective Sequence</b>	This field is populated.
<b>Job Indicator</b>	This field is populated based on the data selected on the Work Location tab.
<b>Action</b>	This field is populated based on the data selected on the Work Location tab.
<b>Reason</b>	This field is populated based on the data selected on the Work Location tab.
<b>Compensation Rate</b>	This field is populated with the compensation rate for the person, which is the sum of all base pay salary componenets.
<b>*Frequency</b>	Enter the frequency or select a frequency by clicking the search icon. The selection is displayed to the right of the field.
<b>Change Amount</b>	This field is populated with the change in the amount of compensation for the rate code.
<b>Compa-Ratio</b>	This field is populated with the percent-truough-range calculation, based on the salary plan and grade and the currency that the organization uses.
<b>Change Percent</b>	This field is populated with the percent of change in the amount of compensation for the rate code.

19. Click **Default Pay Components** to:

- Carry out rate code defaults (excluding seniority pay) based on the current values of designated job fields.

- Replace manual updates and old default values with the current default values.
- Recalculate the compensation package of affected person, including the compensation rate, currency, frequency, apply FTE, percent (including current rate code groups), salary points, automatically calculated premium, etc.
- Recalculate compensation-related fields, such as annual amounts or compa-ratio, on the Job Data record.

If this button is not clicked after updating relevant job data fields, the system issues a warning when you attempt to save a new record. If **OK** is clicked, the system displays this page, where you can click this button and make any required changes. If this button is not clicked, the component package doesn't appear by default until the next time the default component logic is triggered (either when the button is clicked or through a batch update process).

<b>Pay Components/*Rate Code</b>	Enter the rate code or select a code by clicking the search icon.
<b>Pay Components/Seq</b>	Enter the Sequence information.
<b>Pay Components/Comp Rate</b>	Enter the compensation rate or select a rate by clicking on the
<b>Pay Components/Currency</b>	Enter the currency or select the currency by clicking the search icon.
<b>Pay Components/Frequency</b>	Enter the frequency or select the frequency by clicking the search icon.
<b>Pay Components/Points</b>	Enter the points information.
<b>Pay Components/Percent</b>	Enter the percent.
<b>Pay Components/Rate Code Group</b>	Enter the rate code group or select a group by clicking on the search icon.

20. Click the **Contract Change Prorate Option** link to modify the person's contract proration options. The Controls tab - Pay Components section (**Figure 13**) is displayed.
21. Click the **Controls** tab in the Pay Components Section. The Controls tab - Pay Components section (**Figure 13**) is displayed.

*Rate Code	Seq	Source	Calculated By	Manually Updated	Default Without Override	Details
1	0	None		<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Details</a>

Calculate Compensation

**Figure 13. Controls tab - Pay Components section**

**\*Rate Code** Enter the rate code or select a code by clicking the search icon.

**Seq** Enter the sequence.

**Source** This field is populated with information from the sequence number entered.

**Calculated By**

**Manually Updated** Check this box if applicable.

**Default Without Override** Check this box if applicable.

22. Click the **Details** link to view the details of the controls selected.
23. Click the **Changes** tab in the Pay Components Section. The Changes tab - Pay Components section (**Figure 14**) is displayed.

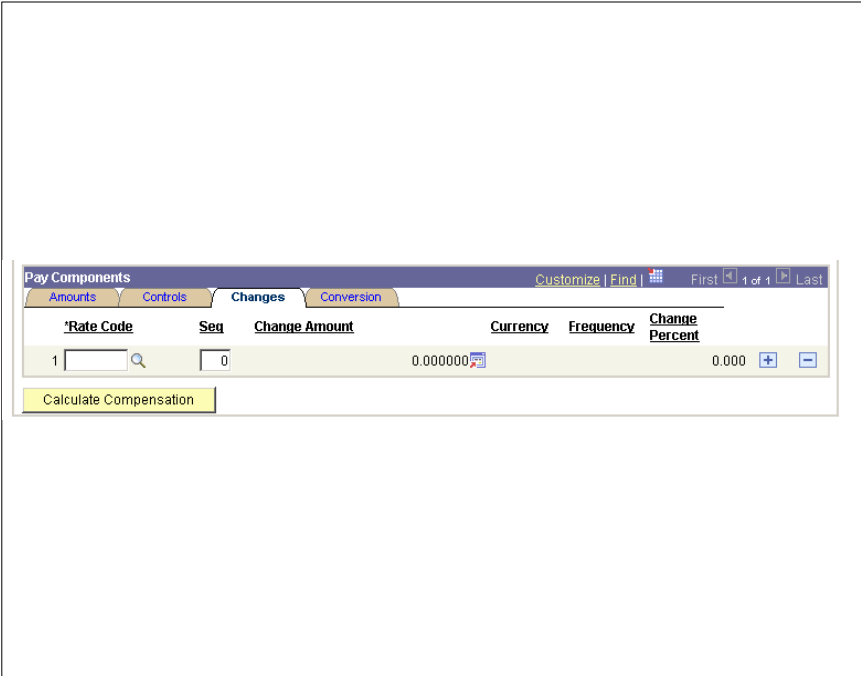


Figure 14. Changes tab - Pay Components section

- \*Rate Code** Enter the rate code or select a code by clicking the search icon.
- Seq** Enter the sequence.
- Change Amount**
- Currency**
- Frequency**
- Change Percent**

24. Click the **Conversion** tab in the Pay Components Section. The Conversion tab - Pay Components section (Figure 15) is displayed.

The screenshot shows a software window titled "Pay Components" with a menu bar containing "Customize", "Find", and "First 1 of 1 Last". Below the menu bar are tabs for "Amounts", "Controls", "Changes", and "Conversion". The "Conversion" tab is active. It contains a table with the following columns: "Rate Code", "Seq", "Converted Comp Rate", "Currency", "Frequency", and "Apply FTE". The first row of the table has the values "1", "0", and an unchecked checkbox under "Apply FTE". There are search icons next to the "Rate Code" and "Seq" fields. At the bottom of the window is a yellow button labeled "Calculate Compensation".

Figure 15. Conversion tab - Pay Components section

- \*Rate Code** Enter the rate code or select a code by clicking the search icon.
- Seq** Enter the sequence.
- Converted Comp Rate**
- Currency**
- Frequency**
- Apply FTE** Check this box if applicable.

25. Click **Calculate Compensation**.
26. At this point the following options are available:

Step	Description
Click <b>Ok</b>	
Click <b>Cancel</b>	
Click <b>Apply</b>	
Click <b>Previous Tab</b>	
Click <b>Next Tab</b>	
Click <b>Refresh</b>	

## Person of Interest

### To Add a Person of Interest without job data:

1. Check the **Person of Interest** box.
2. Select the type of Person of Interest to be added. Valid values are as follows:

Person of Interest Type Valid Values
Contracted HCM User
External Instructor
External Trainee
Global Payroll Payee
Other
Other Payee
Stock - Board Member
Stock - Non-HR Employee

3. Complete the fields as follows:

**Person ID**

This field is populated with the system-assigned ID when you are adding a new person. The value will display as **New** until the record is saved.

**Empl Rcd Nbr**

This field is populated.



## Checklist Code

Select the applicable checklist code from the drop-down list. The valid values are:

### Checklist Code Valid Values

Applicant Checklist  
 Applicant Checklist  
 Applicant Checklist  
 Applicant Checklist  
 Applicant Hire Checklist  
 Applicants' Checklist UK  
 Credentialing for Health Care  
 Domestic Loan Assgnmnt Chcklst  
 Domestic Loan Assgnmnt Chcklst  
 Foreign Loan Arrival Chcklst  
 Foreign Loan Departure Chcklst  
 Foreign Loan Host Checklist  
 Foreign Srvc Arrival Checklist  
 Foreign Srvc Departure Chklst  
 Foreign Srvc Host Checklist  
 Hire  
 Immunization Checklist  
 Local Co Govt New Hire Chcklst  
 Netherlands Monitor Absences  
 New Hire Checklist  
 Pre-Employment Checklist  
 Reptraition Checklist  
 Reptraition Checklist  
 Termination  
 Termination Checklist  
 Transfer

4. Click **Add the Relationship**. The Add Person Of Interest tab - Person Of Interest page (Figure 16) is displayed.

Add Person of Interest

JANE DOE

Person ID:0034

Person of Interest Type:Other

Security Data

Find | View All | First1 of 1 | Last

Effective Date:03/09/2009

Get Enabled Security Types

Security Access Type

Enabled

Value 1

Value 2

Person of Interest History

Customize | Find | First1 of 1 | Last

	Effective Date	Status	Planned Exit	More Information
1	03/09/2009	A		

OK

Cancel

Apply

Figure 16. Add Person Of Interest tab - Person Of Interest page

5. Complete the fields as follows:

Person ID

This field is populated with the system-assigned ID when you are adding a new person. The value will display as **New** until the record is saved.

Person Of Interest Type

This field is populated based on the person of interest type selected on the Organizational Relationships tab - Add A Person page (Figure 5).

Effective Date

Enter the effective date or select a date by clicking on the calendar icon.

Security Access Type

Select the security access type from the drop-down list. Valid values are:  
  
Business Unit  
Location  
Institution

OR

6. Click **Get Enabled Security Types**. All security access types are added and enabled.

Enabled

Check this box if applicable.

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<b>Value 1</b>	<p>Enter the value or select a value by clicking on the search icon. If the security access type <b>Business Unit</b> or <b>Institution</b> is selected, select the business unit or institution associated with this person for security purposes.</p> <p>If the security access type <b>Location</b> is selected, first select the appropriate business unit for the location's SetID in Security Key 1 and the location associated with this person for security purposes in Security Key 2.</p>
<b>Value 2</b>	<p>Enter the value or select a value by clicking on the search icon. If the security access type <b>Business Unit</b> or <b>Institution</b> is selected, select the business unit or institution associated with this person for security purposes.</p> <p>If the security access type <b>Location</b> is selected, first select the appropriate business unit for the location's SetID in Security Key 1 and the location associated with this person for security purposes in Security Key 2.</p>
<b>*Effective Date</b>	Enter the effective date or select a date by clicking the calendar icon.
<b>*Status</b>	Enter the status or select a status by clicking on the search icon.
<b>Planned Exit</b>	Enter the planned exit date or select a date by clicking on the calendar icon.
<b>More Information</b>	Enter any additional information.

7. At this point the following options are available:

Step	Description
Click <b>OK</b>	To accept changes and return to the Add Person Of Interest tab - Person Of Interest page ( <b>Figure 16</b> ).
Click <b>Cancel</b>	To cancel action and return to the Add Person Of Interest tab - Person Of Interest page ( <b>Figure 16</b> ).
Click <b>Apply</b>	To apply changes and return to the Add Person Of Interest tab - Person Of Interest page ( <b>Figure 16</b> ).

## Modify A Person

The Modify a Person component allows the user to modify information about a person.

This section contains the following topics:

**Modifying Biographical Details**

**Modifying Organizational Relationships**

**To modify a person:**

1. Select the **Workforce Administration** menu group.
2. Select the **Personal Information** menu.
3. Select the **Biographical** menu item.
4. Select the **Modify A Person** component. The Personal Data page - Find An Existing Value tab (Figure 17) is displayed.

**Personal Data**  
Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value** **Add a New Value**

EmplID: begins with

Name: begins with

Last Name: begins with

Second Name: begins with

Alternate Character Name: begins with

Middle Name: begins with

☐ Include History ☐ Correct History ☐ Case Sensitive

[Basic Search](#) [Save Search Criteria](#)

[Find an Existing Value](#) | [Add a New Value](#)

**Figure 17. Personal Data page - Find An Existing Value tab**

5. Complete the fields as follows:

**EmplID** Enter the EmplID.

**Name** Enter the first name.

**Last Name** Enter the last name.

<b>Second Name</b>	Enter the middle name.
<b>Alternate Character Name</b>	Enter the the nickname.
<b>Include History</b>	Check this box if applicable.
<b>Correct History</b>	Check this box if applicable.
<b>Case Sensitive</b>	Check this box if applicable.

6. Click **Search** to search for the values entered.

**OR**

Click **Clear** to clear all entries.

7. Select the applicable value from the search results. The Biographical Details tab - Add A Person page (**Figure 2**) is displayed. Locate the field(s) to be modified and see field instructions in Add a person for the Biographical Details, Contact Information and Regional tabs for further information.

## Modifying Biographical Details

This section contains the following topics:

**Additional Names**

**Drivers License Data**

**Volunteer Activities**

**General Comments**

### ***Additional Names***

The Additional Names component allows the user to maintain additional name types for a person.

**To add an additional name:**

1. Select the **Workforce Administration** menu group.
2. Select the **Biographical** menu.
3. Select the **Additional Names** component. The Find an Existing Value tab - Additional Names page (**Figure 18**) is displayed.

**Additional Names**  
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search by:

EmplID

begins with

☐ Include History

☐ Correct History

Search

[Advanced Search](#)

Figure 18. Find an Existing Value tab - Additional Names page

4. Complete the fields as follows:

<b>Search by</b>	Select the applicable value from the drop-down menu, then enter the appropriate The valid values are: <b>Search By Valid Values</b> Alternate Character Name EmplID Last Name Middle Name Name Second Name
<b>Include History</b>	Check this box if applicable.
<b>Correct History</b>	Check this box if applicable.
<b>Case Sensitive</b>	Check this box if applicable.

5. Click **Search**

Names Other

first last

Person ID: 180642

Current Names

Customize | Find | View All | First | 1 of 1 | Last

Type of Name	As Of Date	Name	Status	
1 Primary	03/08/2009	last,first middle	Active	<a href="#">View Name History</a> <a href="#">+</a> <a href="#">-</a>

Save

Return to Search

Previous in List

Next in List

Notify

Update/Display

Include History

Correct History

Figure 19.

6. Complete the fields as follows:
- |              |                          |
|--------------|--------------------------|
| Person ID    | This field is populated. |
| Type Of Name | This field is populated. |
| As Of Date   | This field is populated. |
| Name         | This field is populated. |
| Status       | This field is populated  |
7. Click the **View Name History** link. The Name History page (**Figure 20**) is displayed.

Name History

Name History

Type of Name:Primary

NameFindFirst1 of 1Last

Effective Date:03/08/2009Name:last,first middleView NameStatus:Active

OKCancel

Figure 20. Name History page

8. Complete the fields as follows:

Type Of Name	This field is populated with the type of name.
Effective Date	This field is populated with the effective date.
Name	This field is populated with the full name of the employee.
Status	This field is populated with the status of the name.

9. Click the **View Name** link. The View Name page (Figure 21) is displayed.



**View Name**

English Name Format	
<b>Prefix:</b>	Mr
<b>First Name:</b>	first
<b>Last Name:</b>	last
<b>Suffix:</b>	JUNIOR
<b>Middle Name:</b>	middle
<b>Display Name:</b>	first last
<b>Formal Name:</b>	Mr first last
<b>Name:</b>	last,first middle

Figure 21. View Name page

10. Complete the fields as follows:

Prefix	This field is populated with the prefix of the employees name.
First Name	This field is populated with the first name of the employee.
Middle Name	This field is populated with the middle name of the employee.
Last Name	This field is populated with the last name of the employee.
Suffix	This field is populated with the suffix of the employees name.
Display Name	This field is populated with the employees first and last name.
Formal Name	This field is populated with the prefix and the first and last name of the employee.

**Name** This field is populated with the first, middle, and last name of the employee.

11. Click **OK**.

OR

Click **Cancel**.

12. At this point the following options are available:

Step	Description
Click <b>Save</b> .	
Click <b>Return To Search</b> .	
Click <b>Previous In List</b> .	
Click <b>Next In List</b> .	
Click <b>Notify</b> .	
Click <b>Previous Tab</b> .	
Click <b>Include History</b> .	
Click <b>Correct History</b> .	

### ***Driver's License Data***

The Driver's License Data component allows the user to identify driver's license information.

#### **To enter driver's license data:**

1. Select the **Workforce Administration** menu group.
2. Select the **Biographical** menu.
3. Select the **Driver's License Data** component. The Find an Existing Value tab - Identification Data page (**Figure 22**) is displayed.

### Driver's License Data

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

EmplID:	begins with	
Name:	begins with	
Last Name:	begins with	
Second Name:	begins with	
Alternate Character Name:	begins with	
Middle Name:	begins with	

☐ Case Sensitive

[Basic Search](#)

**Figure 22. Find an Existing Value tab - Driver's License Data page**

- Complete the fields as follows:

<b>EmplID</b>	Enter the EmplID.
<b>Name</b>	Enter the first name.
<b>Last Name</b>	Enter the last name.
<b>Second Name</b>	Enter the second name.
<b>Alternate Character Name</b>	Enter the the nickname.
<b>Middle Name</b>	Enter the middle name.
<b>Case Sensitive</b>	Check this box if applicable.

- Click **Search** to search for the values entered.

**OR**

Click **Clear** to clear all entries.

- Select the applicable value from the search results. The Drivers License tab - Driver's License Data page (**Figure 23**) is displayed.

The screenshot shows a web-based form for managing driver's license information. At the top, there's a tab labeled 'Drivers License'. Below it, a header bar displays 'first last' and 'Person ID: 180642'. The main form area is divided into two sections: 'Driver's License Information' and 'License Type'. The 'Driver's License Information' section includes fields for 'Driver's License #', 'Country' (with a dropdown showing 'USA' and 'United States'), 'State' (with a dropdown), 'Issue Location', 'Issuing Authority', 'Valid from/to' (with calendar icons), 'Number of Violations' (0), 'Number of Points' (0), and a checkbox for 'License Suspended'. There's also a 'Comment' field with a text area. The 'License Type' section has a 'License Type' dropdown. At the bottom, a navigation bar contains buttons: 'Save', 'Return to Search', 'Previous in List', 'Next in List', and 'Notify'.

Figure 23. Drivers License tab - Drivers License Data page

7. Complete the fields as follows:

- |                             |   |
|-----------------------------|---|
| <b>Name</b>                 | This field is populated with the employees name.  |
| <b>Person ID</b>            | This field is populated with person ID assigned to the employee.  |
| <b>*Driver's Liscense #</b> | Enter the driver's liscense number.   |
| <b>Country</b>              | Enter the country the driver's liscense was issued or select a country by clicking the search icon. The full name of the entry or selection is displayed to the right of the field. |
| <b>State</b>                | Enter the state in which the driver's liscense was issued or select a state by clicking the search icon.  |
| <b>Issue Location</b>       | Enter the location the driver's liscense was issued.  |
| <b>Issuing Authority</b>    | Enter the issuing authority.  |
| <b>Valid From/To</b>        | Enter the dates the driver's liscense is valid from and to or select the dates by clicking the calendar icon.   |

<b>Number Of Violations</b>	Enter the number of violations.
<b>Number Of Points</b>	Enter the number of points.
<b>License Suspended</b>	Check this box if the employee's license has ever been suspended.
<b>Comment</b>	Enter any applicable comments.
<b>License Type</b>	Enter the type of license or select a type by clicking the search icon.

8. At this point the following options are available:

Step	Description
Click <b>Save</b>	
Click <b>Return To Search</b>	
Click <b>Previous In List</b>	
Click <b>Next In List</b>	
Click <b>Notify</b>	

## Volunteer Activities

The Volunteer Activities component allows the user to identify a person's participation in volunteer programs.

### To enter volunteer activities:

1. Select the **Workforce Administration** menu group.
2. Select the **Personal Information** menu.
3. Select the **Security Clearance** component. The Find an Existing Value tab - Volunteer Activities page (**Figure 24**) is displayed.

Volunteer Activities

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

EmplID:

begins with

Name:

begins with

Last Name:

begins with

Second Name:

begins with

Alternate Character Name:

begins with

Middle Name:

begins with

☐ Case Sensitive

Search

Clear

[Basic Search](#)


 [Save Search Criteria](#)

Figure 24. Find an Existing Value tab - Volunteer Activities page

4. Complete the fields as follows:

- |                                 |                                   |
|---------------------------------|-----------------------------------|
| <b>EmplID</b>                   | Enter the EmplID.                 |
| <b>Empl Rcd Nbr</b>             | Enter the employee record number. |
| <b>Name</b>                     | Enter the name.                   |
| <b>Last Name</b>                | Enter the last name.              |
| <b>Second Name</b>              | Enter the middle name.            |
| <b>Alternate Character Name</b> | Enter the the nickname.           |
| <b>Middle Name</b>              | Enter the middle name.            |
| <b>Case Sensitive</b>           | Check this box if applicable.     |

5. Click **Search** to search for the values entered.

OR

Click **Clear** to clear all entries.

6. Select the applicable value from the search results. The Volunteer activities tab - Volunteer Activities page (**Figure 25**) is displayed.

The screenshot displays the 'Volunteer Activities' tab within a web application. At the top, there's a header with 'first last' and 'Person ID: 180642'. Below this is a search bar with 'Find | View All' and pagination 'First 1 of 1 Last'. The main form area contains several input fields: 'Volunteer Organization' with a search icon, 'Start Date' and 'End Date' with calendar icons, 'Chapter Name', 'Volunteer Status' with radio buttons for 'Part-time' and 'Full-time', 'Type of Volunteer' with a dropdown menu set to 'Other', and a checkbox for 'Is Volunteer on Leave'. At the bottom of the form, there are five buttons: 'Save', 'Return to Search', 'Previous in List', 'Next in List', and 'Notify'.

**Figure 25. Volunteer Activities tab - Volunteer Activities page**

7. Complete the fields as follows:

<b>Person ID</b>	This field is populated.
<b>Volunteer Organization</b>	Enter the volunteer organization or select an organization by clicking on the search icon.
<b>Start Date</b>	Check this box if applicable.
<b>End Date</b>	Select a status from the drop-down menu. The valid values are <b>Active</b> and <b>Inactive</b> .
<b>Chapter Name</b>	Enter the chapter name.
<b>Volunteer Status</b>	Select the applicable value, <b>Part-time</b> or <b>Full-time</b> .

**Type of Volunteer** Select the applicable type of volunteer. The valid values are:

**Volunteer Type Valid Values**

Administr

Canvassar

Executive

Fund Raise

Other

**Is Volunteer on Leave** Check this box if applicable.

8. At this point the following options are available:

Step	Description
Click <b>Save</b>	
Click <b>Return To Search</b>	
Click <b>Previous In List</b>	
Click <b>Next In List</b>	
Click <b>Notify</b>	

## General Comments

The General Comments component allow the user to enter comments about a person.

### To enter general comments:

1. Select the **Workforce Administration** menu group.
2. Select the **Biographical** menu.
3. Select the **General Comments** component. The Find an Existing Value tab - General Comments page (**Figure 26**) is displayed.



**General Comments**

Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value**

**EmplID:**  begins with   
**Name:**  begins with   
**Last Name:**  begins with   
**Second Name:**  begins with   
**Alternate Character Name:**  begins with   
**Middle Name:**  begins with   
☐ Case Sensitive

[Basic Search](#)

**Figure 26. Find an Existing Value tab - General Comments page**

- Complete the fields as follows:

<b>EmplID</b>	Enter the EmplID.
<b>Name</b>	Enter the first name.
<b>Last Name</b>	Enter the last name.
<b>Second Name</b>	Enter the second name.
<b>Alternate Character Name</b>	Enter the the nickname.
<b>Middle Name</b>	Enter the middle name.
<b>Case Sensitive</b>	Check this box if applicable.

- Click **Search** to search for the values entered.

**OR**

Click **Clear** to clear all entries.

- Select the applicable value from the search results. The General Comments tab - General Comments page (**Figure 27**) is displayed.

General Comments

first lastPerson ID: 180642

General CommentsFind | View AllFirst1 of 1Last

Comments By:

Comment Date:

Comment:

Save

Return to Search

Previous in List

Next in List

Notify

Figure 27. General Comments tab - General Comments page

7. Complete the fields as follows:

- Name

This field is populated with the employees name.
- Person ID

This field is populated with person ID assigned to the employee.
- Comments By

Enter the name of the person entering the comments.
- Comment Date

Enter the comment date or select a date by clicking the calendar icon.
- Comment

Enter the comments.

8. At this point the following options are available:

Step	Description
Click <b>Save</b>	
Click <b>Return To Search</b>	
Click <b>Previous In List</b>	
Click <b>Next In List</b>	
Click <b>Notify</b>	

## Modifying Organizational Relationships

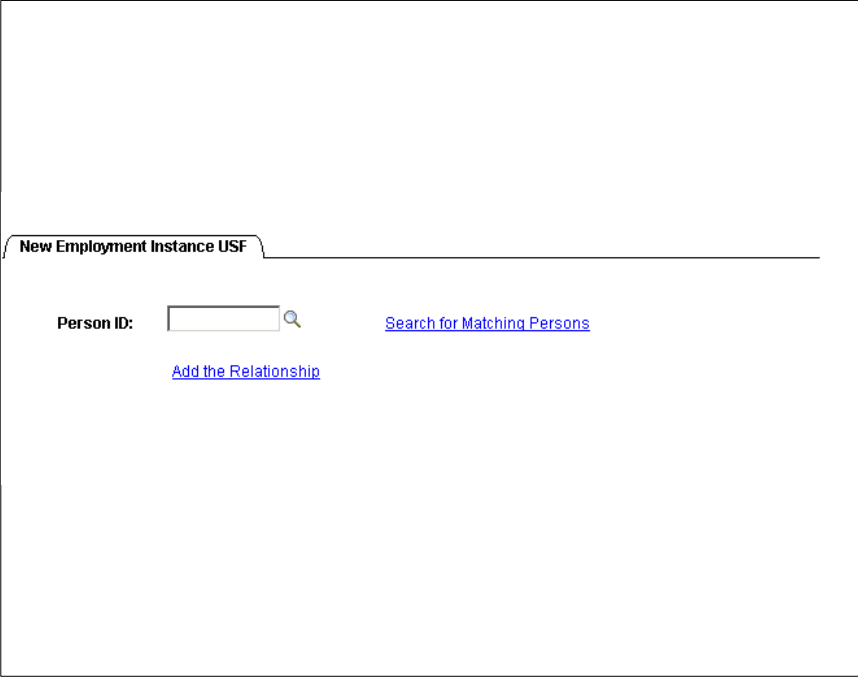
This section contains the following topics:

- New Employment Instance USF**
- New Contingent Worker Instance**
- Prior Work Experience**
- Job Data**
- Add a POI Relationship**
- Person Checklist**


### ***New Employment Instance USF***

The New Employment Instance USF component allows the user to create a new employee instance along with the job data for the employee. This will also create a new Employee Record Number.

1. Select the **Workforce Administration** menu group.
2. Select the **Personal Information** menu.
3. Select the **Organizational Relationships** menu item.
4. Select the **New Employment Instance USF** component. The New Employment Instance tab page (**Figure 28**) is displayed.



New Employment Instance USF

Person ID:   [Search for Matching Persons](#)

[Add the Relationship](#)

**Figure 28. New Employment Instance tab page**

5. Complete the fields as follows:

**Person ID**

Enter the Person ID or select a person by clicking the search icon.

6. Click the **Add The Relationship** link. The Data Control tab - Add Employee page (Figure 6) is displayed. For more information on PAR Processing, refer to Chapter 17, Section 5.

OR

Click the **Search For Matching Persons** link. The Search/Match page (Figure 29) is displayed.

Search/Match

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Type:

=

Person

Search Parameter:

begins with

Ad Hoc Search

☐

Description:

begins with

Search

Clear

Basic Search

Save Search Criteria

Search Results

View All

First

1-7 of 7

Last

Search Type	Search Parameter	Ad Hoc Search	Description
Person	PSCS_ADHOC	Y	CS Person Adhoc Search
Person	PSCS_CR_SEARCH	Y	CR Person Search
Person	PSCS_EA	N	External Award Stage Rules
Person	PSCS_TRADITIONAL	N	CS Person Traditional
Person	PSHR_HIRE	N	Template-Based Hire person
Person	PSHR_SAVE_TIME	N	HR Auto Run at Save Time
Person	PSRS_HIRE	N	Prepare For Hire

Figure 29. Search/Match page

7. Complete the fields as follows:

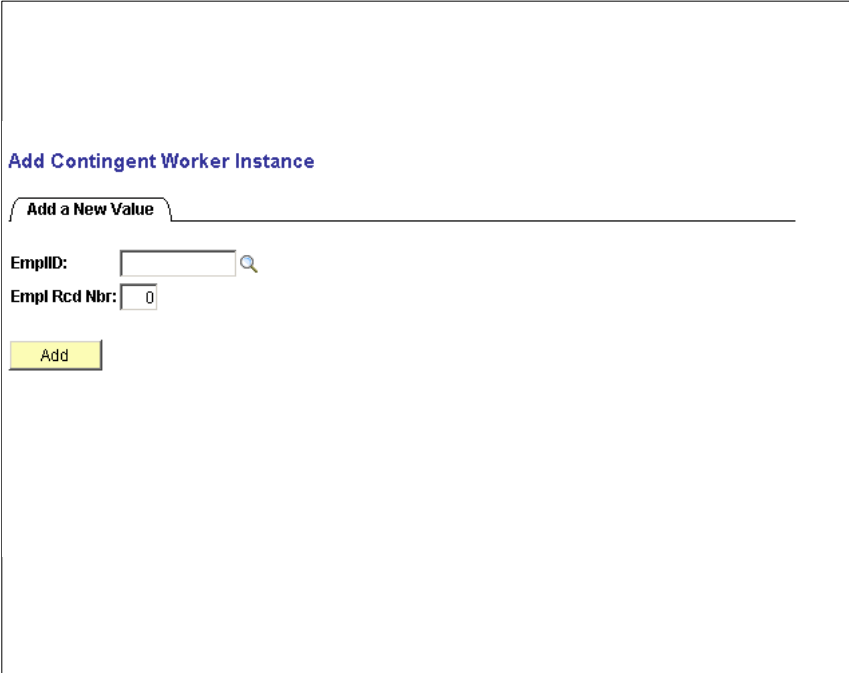
Search Type	Select the type of search from the drop-down menu. Valid values are <b>Applicant</b> , <b>Organization</b> , or <b>Person</b> .
Search Parameter	Enter the search parameter or select a parameter by clicking the search icon.
Ad Hoc Search	Check this box if applicable.
Description	Enter the description.

8. Click **Search**. Select the applicable value from the search results. The Search Criteria page is displayed (Figure 84). See Search for Matching Persons for more information.

**New Contingent Worker Instance**

The New Contingent Worker Instance component allows the user to create a new contingent worker instance along with the job data for the person. This will also create a new employee record number.

1. Select the **Workforce Administration** menu group.
2. Select the **Personal Information** menu.
3. Select the **Organizational Relationships** menu item.
4. Select the **New Contingent Worker Instance** component. The Add Contingent worker Instance page - Add A New value tab (**Figure 30**) is displayed.



The screenshot shows a web interface for adding a new contingent worker instance. At the top, there is a blue header with the text "Add Contingent Worker Instance". Below this, there is a tab labeled "Add a New Value". Under the tab, there are two input fields: "EmplID:" followed by a text box with a magnifying glass icon, and "Empl Rcd Nbr:" followed by a text box containing the number "0". At the bottom of the form, there is a yellow button labeled "Add".

**Figure 30. Add Contingent Worker Instance page - Add A New Value tab**

5. Complete the fields as follows:

<b>EmplID</b>	Enter the EmplID or select an ID by clicking the search icon.
<b>Empl Rcd Nbr</b>	Enter the Employee Record Number.
6. Click **Add**. The Work Location tab - Contingent Worker page (**Figure 7**) is displayed. See Add Contingent Worker for more information.

### **Prior Work Experience**

The Prior Work Experience allows the user to enter a person's previous work experience.

#### **To enter prior work experience:**

1. Select the **Workforce Administration** menu group.
2. Select the **Personal Information** menu.

3. Select the **Biographical** menu item.
4. Select the **Prior Work Experience** component. The Find an Existing Value tab - Prior Work Experience page (**Figure 31**) is displayed.

**Prior Work Experience**  
Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value**

EmpID:  begins with

Name:  begins with

Last Name:  begins with

Second Name:  begins with

Alternate Character Name:  begins with

Middle Name:  begins with

☐ Case Sensitive

[Basic Search](#)

**Figure 31. Find an Existing Value tab - Prior Work Experience page**

5. Complete the fields as follows:

<b>EmplID</b>	Enter the EmplID.
<b>Empl Rcd Nbr</b>	Enter the employee record number.
<b>Name</b>	Enter the name.
<b>Last Name</b>	Enter the last name.
<b>Second Name</b>	Enter the middle name.
<b>Alternate Character Name</b>	Enter the the nickname.
<b>Middle Name</b>	Enter the middle name.
<b>Case Sensitive</b>	Check this box if applicable.

6. Click **Search** to search for the values entered.

**OR**

Click **Clear** to clear all entries.

7. Select the applicable value from the search results. The Prior Work Experience tab - Prior Work Experience page (Figure 32) is displayed.

**Figure 32. Prior Work Experience tab - Prior Work Experience page**

8. Complete the fields as follows:

<b>Name</b>	This field is populated with the employees name.
<b>Person ID</b>	This field is populated with person ID assigned to the employee.
<b>Years Of Work Experience</b>	This field is populated.
<b>Sequence Number</b>	Enter the sequence number.
<b>*Start/End Date</b>	Enter the start/end date of the work experience or select the dates by clicking on the calendar icon.
<b>Relevant Work Experience</b>	Check this box if applicable.

<b>Employer</b>	Enter the employer.
<b>Country</b>	enter the country.
<b>City</b>	Enter the city or select a city by clicking on the search icon.
<b>State</b>	Enter the state of select a state by clicking on the search icon.
<b>Phone</b>	Enter the phone number.
<b>Ending Job Title</b>	Enter the last job title held.
<b>Ending Pay Rate</b>	Enter the ending pay rate or select a pay rate by clicking the currency icon.
<b>Pay Frequency</b>	<p>Select the pay frequency from the drop-down menu. The valid values are:</p> <p><b>Pay Frequency Valid Values</b></p> <p>Annual</p> <p>Bi-weekly</p> <p>Fee Basis</p> <p>Hour</p> <p>Month</p> <p>Per Day</p> <p>Per Diem</p> <p>Per Hour</p> <p>Per Month</p> <p>W/O Comp</p> <p>Year</p>
<b>Description</b>	Enter the description of the work experience gained.

9. At this point the following options are available:

Step	Description
Click <b>Save</b>	
Click <b>Return To Search</b>	
Click <b>Previous In List</b>	



Step	Description
Click <b>Next In List</b>	
Click <b>Notify</b>	

## Job Data

The Job Data component allows the user view and modify job data for Contingent Workers and POIs with jobs only.

### To view/modify job data:

1. Select the **Workforce Administration** menu group.
2. Select the **Job Information** menu.
3. Select the **Job Data** component. The Find An Existing value tab - Job Data page (Figure 33) is displayed.

**Job Data**  
Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value**

EmplID: begins with

Empl Rcd Nbr: =

Name: begins with

Last Name: begins with

Second Name: begins with

Alternate Character Name: begins with

Middle Name: begins with

☐ Include History ☐ Correct History ☐ Case Sensitive

[Basic Search](#)

Figure 33. Find An Existing Value tab - Job Data page

4. Complete the fields as follows:

**EmplID** Enter the EmplID.

**Empl Rcd Nbr** Enter the employee record number.

**Name** Enter the name.

<b>Last Name</b>	Enter the last name.
<b>Second Name</b>	Enter the middle name.
<b>Alternate Character Name</b>	Enter the the nickname.
<b>Middle Name</b>	Enter the middle name.
<b>Include History</b>	Check this box if applicable.
<b>Correct History</b>	Check this box if applicable.
<b>Case Sensitive</b>	Check this box if applicable.

- Click **Search** to search for the values entered. The Work Location tab - ??? page (Figure 34) is displayed.

OR

Click **Clear** to clear all entries.

- Locate the field(s) to be modified and see field instructions in Add an Employee, Add a Contingent Worker or POI with job data for further information.

Work Location Job Information Job Labor Payroll Salary Plan Compensation

Patricia Blumenthal EMP ID: 085974 Empl Rcd #: 0

Work Location Find First 1 of 1 Last

HR Status: Job Status: Active Go To Row + -

\*Effective Date: 01/04/2009 Sequence: 11 \*Job Indicator: Primary Job

\*Action: (Invalid Value) Reason: From NFC

Last Start Date: 12/08/2008 Termination Date: 12/06/2008

Expected Job End Date: Expected Return Date: 01/01/1900

Last Date Worked: 12/06/2008 ☐ Override Last Date Worked Position Entry Date: 12/07/2008

Position Number: 90371702 AUDR ☐ Position Management Record

Regulatory Region: USA United States

Company: AG Department of Agriculture

Business Unit: NFC National Finance Center Department Entry Date:

Department: 936414 RISK MANAGEMENT OFFICE

Location: 221690071

Establishment ID: Date Created: 12/18/2008

Job Data Employment Data Earnings Distribution Benefits Program Participation

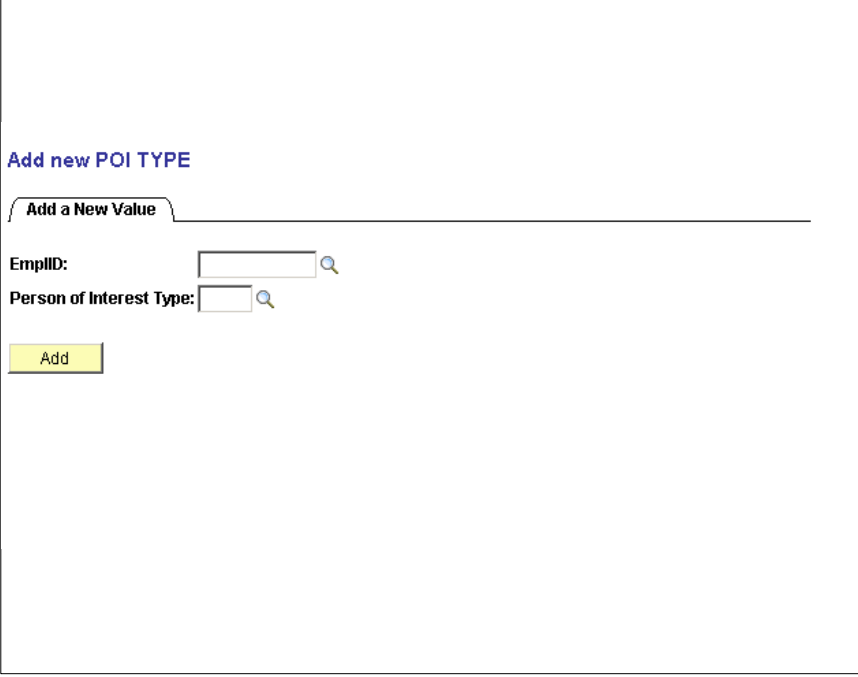
Save Return to Search Notify Previous tab Next tab Refresh Update/Display Include History Correct History

Figure 34. Work Location tab - Job Data page

## Add A POI Relationship

This component will create a new POI instance with or without job data for the employee. This will also create a new Employee Record Number.

1. Select the **Workforce Administration** menu group.
2. Select the **Personal Information** menu.
3. Select the **Organizational Relationships** menu item.
4. Select the **Add A POI Relationship** component. The Add New POI Type page - Add A New Value tab (Figure 35) is displayed.



The screenshot shows a web interface for adding a new POI type. At the top, there is a header 'Add new POI TYPE'. Below it is a tabbed interface with the 'Add a New Value' tab selected. The form contains two input fields: 'EmplID:' and 'Person of Interest Type:'. Each field has a search icon (magnifying glass) to its right. Below the input fields is a yellow button labeled 'Add'.

Figure 36. Add New POI Type page - Add A New Value tab

5. Complete the fields as follows:
 

<b>EmplID</b>	Enter the EmplID or select an ID by clicking the search icon.
<b>Person Of Interest Type</b>	Enter the Person of Interest type or select a type by clicking the search icon.
6. Click **Add**. The Add Person Of Interest tab - Person Of Interest page (Figure 16) is displayed. See Adding A Person Of Interest for more information.

## Company Property

1. Select the **Workforce Administration** menu group.

2. Select the **Job Information** menu.
3. Select the **Company Property** component. The Find an Existing Value tab - Company Property page (**Figure 24**) is displayed.

**Company Property**  
Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value**

EmplID:  begins with

Name:  begins with


Last Name:  begins with

Second Name:  begins with

Alternate Character Name:  begins with

Middle Name:  begins with

☐ Case Sensitive

[Basic Search](#)  [Save Search Criteria](#)

**Figure 37. Find an Existing Value tab - Company Property page**

4. Complete the fields as follows:

<b>EmplID</b>	Enter the EmplID.
<b>Name</b>	Enter the name.
<b>Last Name</b>	Enter the last name.
<b>Second Name</b>	Enter the middle name.
<b>Alternate Character Name</b>	Enter the the nickname.
<b>Middle Name</b>	Enter the middle name.
<b>Case Sensitive</b>	Check this box if applicable.

5. Click **Search** to search for the values entered.

OR

Click **Clear** to clear all entries.

6. Select the applicable value from the search results. The Company Property tab - Company Property page (**Figure 25**) is displayed.

Company Property

Patricia Blumenthal Person ID: 085974

Property Assignment Customize | Find | View All | First 1 of 1 Last

Property	Serial Number	Description	Issue Date	Date Returned
1			06/24/2009	

Save Return to Search Previous in List Next in List Notify

**Figure 38. Company Property tab - Company Property page**

7. Complete the fields as follows:

**Person ID**

This field is populated.

**Property Code**

Enter the property code or select a code by clicking the search icon.

**Description**

**Issue Date**

Enter the issue date or select a date by clicking on the calendar icon.

**Date Returned**

Enter the date returned or select a date by clicking on the calendar icon.

8. Click the **Serial Number** tab. the Company Property, Serial Number tab - Company Property page (**Figure 39**) is displayed.

Company Property

Patricia Blumenthal

Person ID: 085974

Property Assignment

Customize | Find | View All | First 1 of 1 Last

Property	Serial Number
Property Code	Serial Number
1	

Save Return to Search Previous in List Next in List Notify

Figure 39. Company Property, Serial Number tab - Company Property page

9. Complete the fields as follows:

- Person ID

This field is populated.
- Property Code

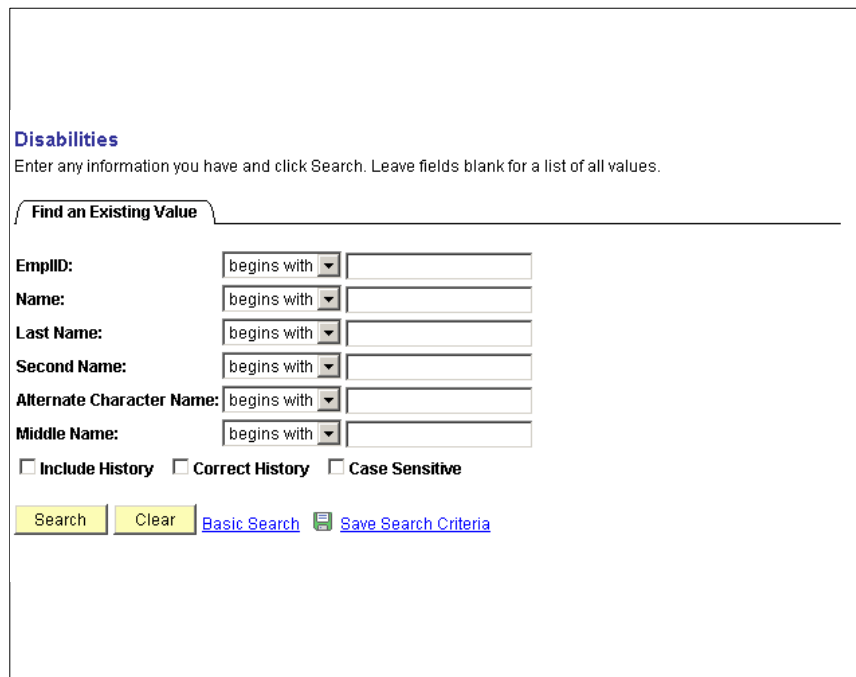
Enter the property code or select a code by clicking the search icon.
- Serial Number

Person Checklist

A checklist is a list of additional components that need to be completed for a person. The Person Checklist allows the user to select and create a checklist for themselves. When the user selects a checklist code for a person and creates a relationship, the application also creates a record in the Person Checklist component. A person can have multiple checklists either at the same time or over time.

## Adding A Disability

1. Select the **Workforce Administration** menu group.
2. Select the **Disability** menu.
3. Select the **Disabilities** component. The Find An Existing Value tab - Disabilities page (Figure 40) is displayed.



**Disabilities**  
Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value**

EmplID: begins with

Name: begins with

Last Name: begins with

Second Name: begins with

Alternate Character Name: begins with

Middle Name: begins with

☐ Include History ☐ Correct History ☐ Case Sensitive


[Basic Search](#)  [Save Search Criteria](#)

Figure 40. Find An Existing Value tab - Disabilities page

4. Complete the fields as follows:

<b>EmplID</b>	Enter the EmplID.
<b>Name</b>	Enter the first name.
<b>Last Name</b>	Enter the last name.
<b>Second Name</b>	Enter the second name.
<b>Alternate Character Name</b>	Enter the nickname if applicable.
<b>Middle Name</b>	Enter the middle name.

- |                        |                               |
|------------------------|-------------------------------|
| <b>Include History</b> | Check this box if applicable  |
| <b>Correct History</b> | Check this box if applicable. |
| <b>Case Sensitive</b>  | Check this box if applicable. |

5. Click **Search**. The Disability tab - Disabilities page (**Figure 41**) is displayed.  
OR  
Click **Clear** to clear the entry.

The screenshot shows a web application interface for managing disabilities. At the top, there are four tabs: "Disability" (selected), "Accommm Request", "Accommm Option", and "Accommm Job Task". Below the tabs, there is a form with the following fields: "first last" (empty), "Person ID:" (180642), "Disability Status" (a dropdown menu with "Disabled" selected), and "Disability" (a dropdown menu with "Disabled Veteran" selected). Below the form, there is a row of buttons: "Save", "Return to Search", "Previous in List", "Next in List", "Notify", "Previous tab", "Next tab", "Update/Display", "Include History", and "Correct History". At the bottom, there is a breadcrumb trail: "Disability | Accommm Request | Accommm Option | Accommm Job Task".

**Figure 41. Disability tab - Disabilities page**

6. Complete the fields as follows:
- |                                    |  |
|------------------------------------|--|
| <b>Name</b>                        | This field is populated with the name of the person. |
| <b>Person ID</b>                   | This field is populated with the person ID.          |
| <b>Disability Status/Disabled</b>  | Check this box if applicable                         |
| <b>Disability/Disabled Veteran</b> | Check this box if applicable.                        |
7. Click the **Accomm Request** tab. The Accommm Request tab - Disabilities page (**Figure 42**) is displayed.



The screenshot displays the 'Accomm Request' tab in the EmpowHR system. At the top, there are tabs for 'Disability', 'Accomm Request', 'Accomm Option', and 'Accomm Job Task'. The 'Accomm Request' tab is active. Below the tabs, there is a header section with 'first last' and 'Person ID: 180642'. The main section is titled 'Request Details' and contains several fields: '\*Accommodation ID:', '\*Date of Request:', 'Business Unit: NFC National Finance Center', 'Department: 936413 CYBER SECURITY STAFF', 'Job Code: 175016 SECUR GUARD', 'Location Code: 010224043', and a 'Comment:' field. Below these fields are radio buttons for 'Pending', 'Accepted', and 'Undue Hardship', and a '\*Request Status Date:' field. At the bottom, there is a table with the following structure:

Regulatory Region	Diagnosis Code	Description
1 USA		

Below the table, there are several buttons: 'Save', 'Return to Search', 'Previous in List', 'Next in List', 'Notify', 'Previous tab', 'Next tab', 'Update/Display', 'Include History', and 'Correct History'. At the very bottom, there are links: 'Disability | Accom Request | Accom Option | Accom Job Task'.

Figure 42. Accom Request tab - Disabilities page

8. Complete the fields as follows:

- |                          |   |
|--------------------------|---|
| <b>Name</b>              | This field is populated with the name of the person.                          |
| <b>Person ID</b>         | This field is populated with the person ID.                                   |
| <b>*Accommodation ID</b> | Enter the accommodation ID  |
| <b>*Date of Request</b>  | Enter the date of the request or select a date by clicking the calendar icon. |
| <b>Business Unit</b>     | This field is populated.  |
| <b>Department</b>        | This field is populated with the department number and name.                  |
| <b>Job Code</b>          | This field is populated with the job code number and name.                    |
| <b>Location Code</b>     | This field is populated with the location code.                               |
| <b>Comment</b>           | Enter any applicable comments.  |

<b>*Responsible ID</b>	Enter the responsible ID or select and ID by clicking on the search icon.
<b>Pending</b>	Select this option if applicable.
<b>Accepted</b>	Select this option if applicable.
<b>Undue Hardship</b>	Select this option if applicable.
<b>*Request Status Date</b>	Enter the request status date or select a date by clicking the calendar icon.
<b>*Regulatory Region</b>	Enter the regulatory region or select a region by clicking the search icon.
<b>Diagnosis Code</b>	Enter the diagnosis code or select a code by clicking the search icon.
<b>Description</b>	This field is populated based on the regulatory region and diagnosis code entered or selected in the previous fields.

9. Click the **Accomm Option** tab. The Accommm Option tab - Disabilities page (Figure 43) is displayed.

The screenshot displays the 'Accomm Option' tab within the 'Disabilities' section of the EmpowHR system. The interface shows a form for a person with ID 180642. The 'Option Details' section includes fields for Accommodation ID (1), Date of Request, Business Unit (NFC), Department (936413), Job Code (175016), and Location Code (010224043). The 'Accommodations/Alternatives' section has fields for \*Option ID, \*Type, Description, Cost (0.000), \*Accommodation Status (Consider), and \*Status Date. The bottom navigation bar contains buttons for Save, Return to Search, Previous in List, Next in List, Notify, Previous tab, Next tab, Update/Display, Include History, and Correct History. The current tab is 'Accomm Option'.

Figure 43. Accommm Option tab - Disabilities page

10. Complete the fields as follows:

<b>Name</b>	This field is populated with the name of the person.
<b>Person ID</b>	This field is populated with the person ID.
<b>Accommodation ID</b>	This field is populated based on the accommodation ID entered on the The Accommodations Request tab - Disabilities page ( <b>Figure 42</b> ).
<b>Date of Request</b>	This field is populated based on the accommodation ID entered on the The Accommodations Request tab - Disabilities page ( <b>Figure 42</b> ).
<b>Business Unit</b>	This field is populated with the business unit and name.
<b>Department</b>	This field is populated with the department number and name.
<b>Job Code</b>	This field is populated with the job code number and name.
<b>Location Code</b>	This field is populated with the location code.
<b>Comment</b>	Enter any applicable comments.
<b>*Option ID</b>	Enter the option ID.
<b>Employer Suggested Option</b>	Check this box if applicable.
<b>*Type</b>	Enter the type or select a type by clicking the search icon.
<b>Cost</b>	Enter the cost or select a cost by clicking the currency icon.

**\*Accomodation Status**      Select an accomodation status from the drop-down list.  
The valid values are:

**Accomodation Status Valid Values**

- Accepted
- Approved
- Consider
- Hardship
- Offered
- Rejected

**\*Status Date**      Enter the status date or select a date by clicking the calendar icon.

11. Click the **Accomm Job Task** tab. The Accom Job Task tab - Disabilities page (Figure 44) is displayed.

Disability   Accom Request   Accom Option   **Accomm Job Task**

first last      Person ID: 180642

**Job Details**      Find | View All      First | 1 of 1 | Last

Accommodation ID: 1      Date of Request: [calendar icon]

Business Unit: NFC      National Finance Center

Department: 936413      CYBER SECURITY STAFF

Job Code: 175016      SECUR GUARD

Location Code: 010224043

**Job Task Accommodated**      Find | View All      First | 1 of 1 | Last

Business Unit: NFC      National Finance Center

Job Code: 175016      SECUR GUARD

Location: [text box]

Job Task: [text box]

Save   Return to Search   Previous in List   Next in List   Notify   Previous tab   Next tab   Update/Display   Include History   Correct History

Figure 44. Accom Job Task tab - Disabilities page

12. Complete the fields as follows:

**Name**      This field is populated with the name of the person.

**Person ID**      This field is populated with the person ID.

<b>Accommodation ID</b>	This field is populated based on the accommodation ID entered on the The Accommodations Request tab - Disabilities page ( <b>Figure 42</b> ).
<b>Date of Request</b>	This field is populated based on the accommodation ID entered on the The Accommodations Request tab - Disabilities page ( <b>Figure 42</b> ).
<b>Business Unit</b>	This field is populated with the business unit and name.
<b>Department</b>	This field is populated with the department number and name.
<b>Job Code</b>	This field is populated with the job code number and name.
<b>Location Code</b>	This field is populated with the location code.
<b>Job Task Accommodated/ Business Unit</b>	Enter the business unit or select a unit by clicking the search icon. The name is displayed after the entry or selection is made.
<b>Job Task Accommodated/Job Code</b>	Enter the job code or select a code by clicking the search icon. The name is displayed after the entry or selection is made.
<b>Job Task Accommodated/Location</b>	Enter the location or select a location by clicking the search icon. The name is displayed after the entry or selection is made.
<b>Job Task Accommodated/Job Task</b>	Enter the job task or select a task by clicking the search icon. The name is displayed after the entry or selection is made.

13. At this point the following options are available:

Step	Description
Click <b>Save</b> .	
Click <b>Return To Search</b> .	
Click <b>Previous In List</b> .	
Click <b>Next In List</b> .	
Click <b>Notify</b> .	

Step	Description
Click <b>Previous Tab</b> .	
Click <b>Include History</b> .	
Click <b>Correct History</b> .	

## Adding Identification Data

1. Select the **Workforce Administration** menu group.
2. Select the **Personal Information** menu.
3. Select the **Citizenship** menu item.
4. Select the **Identification Data** component. The Find an Existing Value tab - Identification Data page (**Figure 54**) is displayed.

**Identification Data**  
Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value**

EmplID: begins with

Name: begins with

Last Name: begins with

Second Name: begins with

Alternate Character Name: begins with

Middle Name: begins with

☐ Include History ☐ Correct History ☐ Case Sensitive

[Basic Search](#) [Save Search Criteria](#)

**Figure 45. Find an Existing Value tab - Identification Data page**

5. Complete the fields as follows:

<b>EmplID</b>	Enter the EmplID.
<b>Name</b>	Enter the first name.
<b>Last Name</b>	Enter the last name.
<b>Second Name</b>	Enter the second name.
<b>Alternate Character Name</b>	Enter the the nickname.

- Middle Name

Enter the middle name.
- Include History

Check this box if applicable.
- Correct History

Check this box if applicable.
- Case Sensitive

Check this box if applicable.

6. Click **Search** to search for the values entered.
- OR
- Click **Clear** to clear all entries.
7. Select the applicable value from the search results. The Citizenship/Passport tab - Identification Data page (**Figure 46**) is displayed.

Citizenship/Passport

Visa/Permit Data

Employee Photo

first last

Person ID: 180642

Citizenship/Passport

Find

First

1 of 1

Last

\*Country: USA United States

Citizenship Status: US Citizen

Go To Row

Passport Information

Find

View All

First

1 of 1

Last

\*Passport Number:

Issue Date:

Expiration Date:

Country: USA United States

State:

City:

Authority:

Comment:

Save

Return to Search

Notify

Previous tab

Next tab

Update/Display

Include History

Correct History

Citizenship/Passport | Visa/Permit Data | Employee Photo

Figure 46. Citizenship/Passport tab - Identification Data page

8. Complete the fields as follows:
- Name

This field is populated with the employees name.
- Person ID

This field is populated with person ID assigned to the employee.
- \*Country

Enter the country or select a country by clicking the search icon.



- Citizenship Status** Select the citizenship status from the drop-down list. The valid values are:
- \*Passport Number** Enter the passport number.
- Issue Date** Enter the date the passport was issued or select a date by clicking the calendar icon.
- Expiration Date** Enter the date the passport will expire or select a date by clicking the calendar icon.
- Country** Enter the country or select a country by clicking the search icon.

9. Click the **Visa/Permit Data** tab. The Visa/Permit Data tab - page (Figure 47) is displayed

The screenshot shows the 'Visa/Permit Data' tab selected. The form contains the following fields:

- \*Country: [Search icon]
- \*Type: [Search icon]
- \*Effective Date: 04/16/2009 [Calendar icon]
- Number: [Text box]
- \*Status: Applied For [Dropdown]
- \*Status Date: 04/16/2009 [Calendar icon]
- Duration: [Text box] Months [Dropdown]
- Issue Date: [Calendar icon]
- Date of Entry into Country: [Calendar icon]
- Expiration Date: [Calendar icon]
- Issuing Authority: [Text box]
- Issue Place: [Text box]

Below the form is a table titled 'Supporting Documents Needed':

*Sup Doc ID	Description	Request Date	Date Received
1	[Search icon]	[Calendar icon]	[Calendar icon]

At the bottom of the page are navigation buttons: Save, Return to Search, Notify, Previous tab, Next tab, Update/Display, Include History, and Correct History. The page also has tabs for Citizenship/Passport, Visa/Permit Data, and Employee Photo.

Figure 47.

10. Complete the fields as follows:

- Name** This field is populated with the employees name.
- Person ID** This field is populated with person ID assigned to the employee.

<b>*Country</b>	Enter the country or select a country by clicking the search icon.
<b>*Type</b>	Select the type of visa/permit or select a type by clicking the search icon.
<b>*Effective Date</b>	Enter the effective date or select a date by clicking the calendar icon.
<b>Number</b>	Enter the visa/permit number.
<b>*Status</b>	Select a status from the drop-down list. The valid values are:
<b>*Status Date</b>	Enter the status date or select a date by clicking the calendar icon.
<b>Duration</b>	Enter the number of the duration of the visa/permit, then select the timeframe from the drop-down list. The valid values are:
<b>Issue Date</b>	Enter the date the visa/permit was issued or select a date by clicking the calendar icon.
<b>Date Of Entry Into Country</b>	Enter the date the employee entered into the country or select a date by clicking the calendar icon.
<b>Expiration Date</b>	Enter the expiration date of the visa/permit or select a date by clicking the calendar icon.
<b>Issuing Authority</b>	Enter the issuing authority.
<b>Issue Place</b>	Enter the place the visa/permit was issued.
<b>*Sup Doc ID</b>	Enter the supporting document ID or select an ID by clicking the search icon. The description of your entry or selection is displayed to the right.
<b>Request Date</b>	Enter the request date of the visa/permit or select a date by clicking the calendar icon.

**Date Received** Enter the receipt date of the visa/permit or select a date by clicking the calendar icon.

11. Select the **Employee Photo** tab. The Employee Photo tab - page (**Figure 48**) is displayed.

Citizenship/Passport Visa/Permit Data **Employee Photo**

first last Person ID: 180642

+ -

Save Return to Search Notify Previous tab Next tab Update/Display Include History Correct History

Citizenship/Passport | Visa/Permit Data | Employee Photo

**Figure 48.**

12. Complete the fields as follows:

**Name** This field is populated with the employees name.

**Person ID** This field is populated with person ID assigned to the employee.

Step	Description
Click <b>Save</b> .	
Click <b>Return To Search</b> .	
Click <b>Previous In List</b> .	
Click <b>Next In List</b> .	
Click <b>Notify</b> .	
Click <b>Previous Tab</b> .	
Click <b>Include History</b> .	
Click <b>Correct History</b> .	

## Viewing Person Data

This section contains the following topics:

- Person Organizational Summary**
- Expiration Inquiry**

### Person Organizational Summary

This component will allow users to view all of the relationships with basic information on each.

1. Select the **Workforce Administration** menu group.
2. Select the **Personal Information** menu.
3. Select the **Person Organizational Summary** component. The Find An Existing Value tab - Person Organizational Summary page (**Figure 49**) is displayed.

**Person Organizational Summary**

Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value**

EmplID: begins with

Name: begins with

Last Name: begins with

Second Name: begins with

Alternate Character Name: begins with

Middle Name: begins with

☐ Case Sensitive

[Basic Search](#) [Save Search Criteria](#)

**Figure 49. Find An Existing Value tab - Person Organizational Summary page**

4. Complete the fields as follows:

**EmplID** Enter the EmplID.

**Name** Enter the name.

**Last Name** Enter the last name.

**Second Name** Enter the middle name.

**Alternate Character Name** Enter the the nickname.

**Middle Name** Enter the middle name.

**Case Sensitive** Check this box if applicable.

- Click **Search** to search for the values entered. The Person Org Summary tab - Person Organizational page (**Figure 50**) is displayed.

OR

Click **Clear** to clear all entries.

**Person Org Summary**

first last **Person ID:** 180642

**Employment Instances** Find | View All First 1 of 1 Last

ORG Instance: 0 Last Hire: Termination Date:

HR Status: Payroll Status: Active

**Assignments** Customize | Find First 1 of 1 Last

Empl Rcd#	Home/Host	HR Status	Payroll Status	Date Last Change	Business Unit	Department	Last Asgn Start	Term Date
0				03/08/2009	NFC	936413		

**Contingent Worker Instances** Find | View All First 1 of 2 Last

ORG Instance: 1 Last Start: 03/26/2009 Termination Date:

HR Status: Active Payroll Status: Active

**Assignments** Customize | Find First 1 of 1 Last

Empl Rcd#	Home/Host	HR Status	Payroll Status	Date Last Change	Business Unit	Department	Last Asgn Start	Term Date
1	Home	Active	Active	03/26/2009	STDBU	900330	03/26/2009	

**Person of Interest Instance** Customize | Find First 1 of 1 Last

Person of Interest Type	Empl rcd#	Status	Begin Date/	End Date
Applicant		Active	03/26/2009	

Return to Search Previous in List Next in List Notify

**Figure 50. Person Org Summary tab - Person Organizational page**

- The following fields are included:

**Name**

**Person ID**

**Employment Instances/ORG Instance**

Employment Instances/  
Last Hire

Employment  
Instances/Termination  
Date

Employment  
Instances/HR Status

Employment  
Instances/Payroll Status

Employment  
Instances/Assignments/E  
mpl Rcd #

Employment  
Instances/Assignments/  
Home/Host

Employment  
Instances/Assignments/  
HR Status

Employment  
Instances/Assignments/P  
ayroll Status

Employment  
Instances/Assignments/  
Date Last Change

Employment  
Instances/Assignments/  
Business Unit

Employment  
Instances/Assignments/  
Department

Employment  
Instances/Assignments/L  
ast Asgn Start

Employment  
Instances/Assignments/T  
erm Date

**Contingent Worker  
Instances/ORG Instance**

**Contingent Worker  
Instances/ Last Hire**

**Contingent Worker  
Instances/Termination  
Date**

**Contingent Worker  
Instances/HR Status**

**Contingent Worker  
Instances/Payroll Status**

**Contingent Worker  
Instances/Assignments/E  
mpl Rcd #**

**Contingent Worker  
Instances/Assignments/  
Home/Host**

**Contingent Worker  
Instances/Assignments/  
HR Status**

**Contingent Worker  
Instances/Assignments/P  
ayroll Status**

**Employment  
Instances/Assignments/  
Date Last Change**

**Contingent Worker  
Instances/Assignments/  
Business Unit**

**Contingent Worker  
Instances/Assignments/  
Department**

**Contingent Worker  
Instances/Assignments/L  
ast Asgn Start**

Contingent Worker  
Instances/Assignments/T  
erm Date

Person Of Interest  
Instance/Person Of  
Interest Type

Person Of Interest  
Instance/Empl Rcd#

Person Of Interest  
Instance/Status

Person Of Interest  
Instance/ Begin Date/

Person Of Interest  
Instance/End Date

7. Click **Return To Search** to search for additional employee data.

## Expiration Inquiry

1. Select the **Workforce Administration** menu group.
2. Select the **Personal Information** menu.
3. Select the **Expiration Inquiry** component. The Expiration Inquiry page (**Figure 51**) is displayed.



### Expiration Inquiry

Enter the search criteria to filter the Expiration information.

Search Criteria

Begin Date:

📅

End Date:

📅

Person ID:

🔍

Org Relation:

▼

Name:

Begins with ▼

Last Name:

Begins with ▼

Second Name:

Begins with ▼

Alternate Char Name:

Begins with ▼

Expiration Type

☒ Contracts

☒ Badges

☒ Contract Task Order

☒ Security Clearance

☒ Assignments

Search

Figure 51. Expiration Inquiry page

4. Complete the fields as follows:

- Begin Date

Enter the begin date or select a date by clicking the calendar icon.
- End Date

Enter the begin date or select a date by clicking the calendar icon.
- Person ID

Enter the person ID or select and ID by clicking the search icon.
- Org Relation

Select the org relation from the drop-down list. The valid values are **Contingent Worker**, **Employee**, or **Person Of Interest**.
- Name

Enter the first name.
- Last Name

Enter the last name.
- Second Name

Enter the second name if applicable.
- Alternate Char Name

Enter the alternate character name if applicable.

**Expiration  
Type/Contracts** Check this box if applicable.

**Expiration Type/Contract  
Task Order** Check this box if applicable.

**Expiration  
Type/Assignments** Check this box if applicable.

**Expiration Type/Badges** Check this box if applicable.

**Expiration Type/Security  
Clearance** Check this box if applicable.

5. Click **Search**. The ???page is displayed.

# Security

This section contains the following topics:

**Security Clearance**

**Badge**

**Badge/Clearance Access**

## Security Clearance

1. Select the **Workforce Administration** menu group.
2. Select the **Personal Information** menu.
3. Select the **Security Clearance** component. The Find an Existing Value tab - Security Clearance page (**Figure 52**) is displayed.

**Security Clearance**  
Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value**

EmplID: begins with

Name: begins with

Last Name: begins with

Second Name: begins with

Alternate Character Name: begins with

Middle Name: begins with

☐ Include History ☐ Correct History ☐ Case Sensitive

[Basic Search](#) [Save Search Criteria](#)

**Figure 52. Find an Existing Value tab - Security Clearance page**

4. Complete the fields as follows:

**EmplID** Enter the EmplID.

**Empl Rcd Nbr** Enter the employee record number.

**Name** Enter the name.

- Last Name

Enter the last name.
- Second Name

Enter the middle name.
- Alternate Character Name

Enter the the nickname.
- Middle Name

Enter the middle name.
- Include History

Check this box if applicable.
- Correct History

Check this box if applicable.
- Case Sensitive

Check this box if applicable.

5. Click **Search** to search for the values entered.
- OR
- Click **Clear** to clear all entries.
6. Select the applicable value from the search results. The Security Clearance tab - Security Clearance page (**Figure 53**) is displayed.

Security Clearance

first last

EmplID: 180642

Security Clearance

Find | View All

First 1 of 1 Last

Security Clearance Type:

☐ Primary

Clearance Information

Find | View All

First 1 of 1 Last

\*Effective Date: 04/16/2009

\*Status: Active

\*Clearance Nbr:

Expiration Date:

Sponsor:

Background Investigation

Customize | Find | View All

First 1 of 1 Last

Investigation Status

Status Date

Save

Return to Search

Previous in List

Next in List

Notify

Update/Display

Include History

Correct History

Figure 53. Security Clearance tab - Security Clearance page

7. Complete the fields as follows:

<b>EmplID</b>	This field is populated.
<b>Security Clearance Type</b>	Enter the security clearance type or select a type by clicking on the search icon.
<b>Primary</b>	Check this box if applicable.
<b>Status</b>	Select a status from the drop-down menu. The valid values are <b>Active</b> and <b>Inactive</b> .
<b>Clearance Nbr</b>	Enter the clearance number.
<b>Expiration Date</b>	Enter the expiration date or select a date by clicking on the calendar icon.
<b>Sponsor</b>	Enter the sponsor.
<b>Investigation Status</b>	Select the investigation status from the drop-down menu. The valid values are: <b>Investigation Status Valid Values</b> <b>Approved</b> <b>Denied</b> <b>In Progress</b> <b>Initiated</b>
<b>Status Date</b>	Enter the status date or select a date by clicking the calendar icon.

8. At this point the following options are available:

Step	Description
Click <b>Save</b>	
Click <b>Return To Search</b>	
Click <b>Previous In List</b>	
Click <b>Next In List</b>	
Click <b>Notify</b>	
Click <b>Include History</b>	
Click <b>Correct History</b>	

## Badge

1. Select the **Workforce Administration** menu group.

2. Select the **Job Information** menu.
3. Select the **Badge** component. The Find an Existing Value tab - Badge page (**Figure 54**) is displayed.

**Badge**

Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value**

EmplID:  begins with

Name:  begins with

Last Name:  begins with

Second Name:  begins with

Alternate Character Name:  begins with

Middle Name:  begins with

☐ Include History ☐ Correct History ☐ Case Sensitive

[Basic Search](#)

**Figure 54. Find an Existing Value tab - Badge page**

4. Complete the fields as follows:

<b>EmplID</b>	Enter the EmplID.
<b>Name</b>	Enter the first name.
<b>Last Name</b>	Enter the last name.
<b>Second Name</b>	Enter the middle name.
<b>Alternate Character Name</b>	Enter the the nickname.
<b>Include History</b>	Check this box if applicable.
<b>Correct History</b>	Check this box if applicable.
<b>Case Sensitive</b>	Check this box if applicable.

5. Click **Search** to search for the values entered.

**OR**

Click **Clear** to clear all entries.

6. Select the applicable value from the search results. The Badge tab - Badge page (**Figure 2**) is displayed.

**Figure 55. Badge tab - Badge page**

7. Complete the fields as follows:

<b>EmplID</b>	Enter the EmplID.
<b>Badge Type</b>	Enter the badge type or select a type by clicking the search icon.
<b>Empl Rcd#</b>	Enter the employee record number or select a number by clicking the search icon.
<b>Effective Date</b>	Enter the effective date or select a date by clicking the calendar icon.
<b>Status</b>	Select a status from the drop-down menu. The valid values are <b>Active</b> or <b>Inactive</b> .
<b>Badge Number</b>	Enter the badge number.

**Expiration Date** Enter the expiration date or select a date by clicking the calendar icon.

**Comment** Enter the applicable comments.

8. At this point the following options are available:

Step	Description
Click <b>Save</b> .	
Click <b>Return To Search</b> .	
Click <b>Previous In List</b> .	
Click <b>Next In List</b> .	
Click <b>Notify</b> .	
Click <b>Previous Tab</b> .	
Click <b>Include History</b> .	
Click <b>Correct History</b> .	

## Badge/Clearance Access Summary

1. Select the **Workforce Administration** menu group.
2. Select the **Badge/Clearance Access Summary** component. The Find an Existing Value tab - Badge/Clearance Access Summary page (**Figure 56**) is displayed.
- 3.

### Badge/Clearance Access Summary

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

EmpID:

begins with

Name:

begins with

Last Name:

begins with

Second Name:

begins with

Alternate Character Name:

begins with

Middle Name:

begins with

☐ Case Sensitive

Search

Clear

[Basic Search](#)

Save Search Criteria

Figure 56. Find an Existing Value tab - Badge/Clearance Access Summary page



- Complete the fields as follows:

**EmplID** Enter the EmplID.

**Name** Enter the first name.

**Last Name** Enter the last name.

**Second Name** Enter the second name.

**Alternate Character Name** Enter the the nickname.

**Middle Name** Enter the middle name.

**Case Sensitive** Check this box if applicable.

- Click **Search** to search for the values entered.

**OR**

Click **Clear** to clear all entries.

- Select the applicable value from the search results. The Badge History tab - Badge/Clearance Access Summary page (**Figure 57**) is displayed.

The screenshot displays the 'Badge History' tab in the EmpowHR system. At the top, there are three tabs: 'Badge History' (selected), 'Clearance History', and 'Email History'. Below the tabs, there is a search results table. The table has the following columns: 'Badge Type', 'Effective Date', 'Status', 'Badge Number', and 'Expiration Date'. The first row of the table shows the following data: 'Access History Details' for Badge Type, 'first last' for Effective Date, 'EMP' for Status, 'ID: 180642' for Badge Number, and '180642' for Expiration Date. Above the table, there is a header section with 'first last', 'EMP', and 'ID: 180642'. Below the table, there is a navigation bar with buttons: 'Save', 'Return to Search', 'Previous in List', 'Next in List', and 'Notify'. At the bottom of the page, there are links: 'Badge History | Clearance History | Email History'.

**Figure 57. Badge History tab - Badge Information page**

7. Complete the fields as follows:

<b>Name</b>	This field is populated with the employees name.
<b>ID</b>	This field is populated with person ID assigned to the employee.
<b>Badge Type</b>	This field is populated with the type of badge assigned to the employee.
<b>Effective Date</b>	This field is populated with date the badge was issued.
<b>Status</b>	This field is populated with the status of the badge.
<b>Badge Number</b>	This field is populated with the employees badge number.
<b>Expiration Date</b>	This field is populated with the expiration date of the employees badge.

8. Click the **Clearance History** tab. The Clearance History tab - Badge Information page (Figure 58) is displayed.

Badge History Clearance History Email History

first last EMP ID: 180642

Access History Details Customize | Find | View All | First 1 of 1 Last

Clearance Type	Effective Date	Status	Clearance Nbr	Expiration Date	Sponsor
----------------	----------------	--------	---------------	-----------------	---------

Save Return to Search Previous in List Next in List Notify

[Badge History](#) | [Clearance History](#) | [Email History](#)

Figure 58. Clearance History tab - Badge Information page

9. Complete the fields as follows:

<b>Name</b>	This field is populated with the employees name.
<b>ID</b>	This field is populated with person ID assigned to the employee.
<b>Clearance Type</b>	This field is populated with the type of security clearance assigned to the employee.
<b>Effective Date</b>	This field is populated with date the security access was granted.
<b>Status</b>	This field is populated with the status of the employees access.
<b>Clearance Number</b>	This field is populated with the employees clearance number.
<b>Expiration Date</b>	This field is populated with the expiration date of the employees security access.
<b>Sponsor</b>	This field is populated with the name of the employees sponsor.

10. Click the **Email History** tab. The Email History tab - Badge Information page (**Figure 59**) is displayed.



Figure 59. Email History tab - Badge Information page

11. Complete the fields as follows:

Name	This field is populated with the employees name.
ID	This field is populated with person ID assigned to the employee.
Email Type	This field is populated with the type of email address of the employee.
Email Address	This field is populated with the email address of the employee.

12. At this point the following options are available:

Step	Description
Click <b>Save</b> .	
Click <b>Return To Search</b> .	
Click <b>Previous In List</b> .	
Click <b>Next In List</b> .	
Click <b>Notify</b> .	

# Search

This section contains the following topics:

## Search for People

## Search for People

1. Select the **Workforce Administration** menu group.
2. Select the **Personal Information** menu.
3. Select the **Search for People** component. Search/Match page (**Figure 60**) is displayed.

**Search/Match**  
Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value**

**Search Type:** = [dropdown]

**Search Parameter:** begins with [dropdown] [search icon]

**Ad Hoc Search** ☐

**Description:** begins with [dropdown]

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

**Figure 60. Search/Match page**

4. Complete the fields as follows:

<b>Search Type</b>	Select the type of search from the drop-down menu. Valid values are <b>Applicant</b> , <b>Organization</b> , or <b>Person</b> .
<b>Search Parameter</b>	Enter the search parameter or select a parameter by clicking the search icon.
<b>Ad Hoc Search</b>	Check this box if applicable.
<b>Description</b>	Enter the description.

5. Click **Search**. Select the applicable value from the search results. The Search Criteria page is displayed (**Figure 84**). See Search for Matching Persons for more information.

## **Emergency Contacts**

# Contract Administration

This section contains the following topics:

- Update Contracts**
- Define Contract Types**
- Define Contract Clauses**
- Define Contract Templates**
- Service Agreements USF**

## Update Contracts

1. Select the **Workforce Administration** menu group.
2. Select the **Job Information** menu.
3. Select the **Contract Administration** menu item.
4. Select the **Update Contracts** component. The Find an Existing Value tab - Update Contracts page (**Figure 61**) is displayed.

**Update Contracts**  
Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value** **Add a New Value**

EmplID: begins with [ ] [ ]

Contract Number: begins with [ ] [ ]

Name: begins with [ ] [ ]

Last Name: begins with [ ] [ ]

Second Name: begins with [ ] [ ]

Alternate Character Name: begins with [ ] [ ]

☐ Include History ☐ Correct History ☐ Case Sensitive

**Search** **Clear** [Basic Search](#) [Save Search Criteria](#)

[Find an Existing Value](#) | [Add a New Value](#)

**Figure 61. Find an Existing Value tab - Update Contracts page**

5. Complete the fields as follows:

**EmplID** Enter the EmplID.

**Contract Number** Enter the contract number.



<b>Name</b>	Enter the first name.
<b>Last Name</b>	Enter the last name.
<b>Second Name</b>	Enter the middle name.
<b>Alternate Character Name</b>	Enter the the nickname.
<b>Include History</b>	Check this box if applicable.
<b>Correct History</b>	Check this box if applicable.
<b>Case Sensitive</b>	Check this box if applicable.

6. Click **Search** to search for the values entered.

**OR**

Click **Clear** to clear all entries.

7. Select the applicable value from the search results. The Contract Status/Content tab - Update Contracts page (**Figure 63**) is displayed.

The screenshot shows a web interface titled "Update Contracts". At the top, there are two tabs: "Find an Existing Value" (which is active and highlighted in blue) and "Add a New Value" (which is inactive). Below the tabs, there are two input fields: "EmpID:" followed by a text box with a magnifying glass icon, and "Contract Number:" followed by a text box. Below these fields is a yellow "Add" button. At the bottom of the form area, there are two links: "Find an Existing Value" and "Add a New Value", separated by a vertical bar.

**Figure 62. Add a New Value tab - Update Contracts page**

The screenshot shows a web application interface for updating contract information. At the top, there are four tabs: 'Contract Status/Content' (selected), 'Contract Type/Clauses', 'Task Order Information', and 'Signature Date/Probation Info'. Below the tabs, the user's name 'Eileen Spears' and 'Person ID: 151936' are displayed. The main form area is titled 'Contract Data' and contains several input fields: 'Contract Number' (15760), 'Contract Status' (a dropdown menu showing 'Active'), 'Contract Begin Date' (08/12/2009 with a calendar icon), 'Contract Expected End Date' (empty with a calendar icon), 'Contract End Date' (empty with a calendar icon), 'Regulatory Region' (USA with a search icon), and 'Contract Template ID' (empty with a search icon). There are also checkboxes for 'Additional Contract', 'More than one year expected', and 'Waive Working Time Compliance'. A large text area for 'Contract Content' is at the bottom. At the very bottom of the form, there are navigation buttons: 'Save', 'Notify', 'Previous tab', 'Next tab', 'Add', 'Update/Display', 'Include History', and 'Correct History'.

**Figure 63. Contract Status/Content tab - Update Contracts page**

8. Complete the fields as follows:

<b>Name</b>	This field is populated with the name of the person.
<b>Person ID</b>	This field is populated with the person ID.
<b>Contract Number</b>	This field is populated with the contract number.
<b>Contract Status</b>	Select the contract status from the drop-down menu. The valid values are <b>Active</b> and <b>Inactive</b> .
<b>Contract Begin Date</b>	Enter the contract begin date or select a date by clicking on the calendar icon.
<b>Contract Expected End Date</b>	Enter the date the contrac or select a date by clicking on the calendar icon.
<b>Contract End Date</b>	Enter the contract end date or select a date by clicking on the calendar icon.
<b>Regulatory Region</b>	Enter the regulatory region or select a region by clicking the search icon.

<b>Additional Contract</b>	Check this box if applicable.
<b>More Than One Year Expected</b>	Check this box if applicable.
<b>Contract Template ID</b>	Enter the contract template ID or select an ID by clicking the search icon.
<b>Comment</b>	Enter the applicable comments.
<b>Provider ID</b>	Enter the provider ID or select an ID by clicking the search icon.
<b>Contract Content</b>	Enter the contract content.
<b>Waive Working Time Compliance</b>	Check this box if applicable.

9. Click the **Contract Type/Clauses** tab. The Contract Type/Clauses tab - Update Contract page (Figure 64) is displayed.

The screenshot displays the 'Contract Type/Clauses' tab in the EmpowHR system. The page is titled 'Contract Type/Clauses' and shows a form for updating contract information for Eileen Spears (Person ID: 151936). The 'Contract Data' section includes fields for Contract Number (15760), Begin Date (08/12/2009), and Contract Status (Active). Below this is the 'Contract Type' section with an Effective Date (08/12/2009) and a search icon. The 'Contract Clauses' section contains a table with columns for Seq#, Clause, and Clause Status. The first row shows Seq# 1. Below the table are fields for Long Descr and Comment. At the bottom, there are buttons for Save, Notify, Previous tab, Next tab, Add, Update/Display, Include History, and Correct History. Navigation links for Contract Status/Content, Contract Type/Clauses, Task Order Information, and Signature Date/Probation Info are also present.

Figure 64. Contract Type/Clauses tab - Update Contract page

10. Complete the fields as follows:

<b>Name</b>	This field is populated with the name of the person.
-------------	--

<b>Person ID</b>	This field is populated with the person ID.
<b>Contract Number</b>	This field is populated based on the selection made on the Contract Status/Content tab ( <b>Figure 64</b> ).
<b>Contract Begin Date</b>	This field is populated based on the selection made on the Contract Status/Content tab ( <b>Figure 64</b> ).
<b>Contract Status</b>	This field is populated based on the selection made on the Contract Status/Content tab ( <b>Figure 64</b> ).
<b>Effective Date</b>	This field is populated.
<b>Contract Type</b>	Enter the contract type or select a type by clicking on the search icon.
<b>Extend Contract</b>	Check this box if applicable.
<b>Seq #</b>	Enter the sequence number.
<b>Clause</b>	Enter the clause or select a clause by clicking the search icon.
<b>Clause Status</b>	Select the clause status from the drop-down menu. The valid values are <b>Optional</b> and <b>Required</b> .
<b>Long Descr</b>	Enter the long description.
<b>Comment</b>	Enter the applicable comments.

11. Click the **Task Order Information** tab. The Task Order Information tab - Update Contract page (**Figure 65**) is displayed.

Eileen Spears Person ID: 151936

**Contract Data**

Contract Number: 15760      Begin Date: 08/12/2009      Contract Status: Active

Task Order Information				
Task Order #	Description	Begin Date	End Date	Comments
<input type="checkbox"/>				<a href="#">Comments</a>

Select All      Delete Selected

[Save](#)   [Notify](#)   [Previous tab](#)   [Next tab](#)   [Add](#)   [Update/Display](#)   [Include History](#)   [Correct History](#)

[Contract Status/Content](#) | [Contract Type/Clauses](#) | [Task Order Information](#) | [Signature Date/Probation Info](#)

**Figure 65. Task Order Information tab - Update Contract page**

**12. Complete the fields as follows:**

<b>Name</b>	This field is populated with the person's name.
<b>Person ID</b>	This field is populated with the person ID.
<b>Contract Number</b>	This field is populated based on the selection made on the Contract Status/Content tab ( <b>Figure 64</b> ).
<b>Begin Date</b>	This field is populated based on the selection made on the Contract Status/Content tab ( <b>Figure 64</b> ).
<b>Contract Status</b>	This field is populated based on the selection made on the Contract Status/Content tab ( <b>Figure 64</b> ).
<b>Task Order #</b>	
<b>Description</b>	
<b>Begin Date</b>	
<b>End Date</b>	

Comments

13. Click the **Signature Date/Probation Info** tab. The Signature Date/Probation Info tab - Update Contract page (**Figure 66**) is displayed.

Eileen Spears Person ID: 151936

**Contract Data**

Contract Number: 15760 Begin Date: 08/12/2009 Contract Status: Active

**Workforce Information**

Effective Date: 08/12/2009 Empl Rcd#: 0 Job Indicator: Find View All First 1 of 1 Last

Action: Reason:

Company: Pay Group: Work Period: Std Hrs:

Business Unit: Hourly Rate:

Department: Reg/Temp: Monthly Rate:

Location: Labor Agreement: Annual Rate:

Reg Region: Category:

Signature Date: Minimum Hours: 10.00 Maximum Hours: 100.00

Responsible ID:

**Probation Information**

Probation Date: Reason: + -

Save Notify Previous tab Next tab Add Update/Display Include History Correct History

[Contract Status/Content](#) | [Contract Type/Clauses](#) | [Task Order Information](#) | [Signature Date/Probation Info](#)

Figure 66. Signature Date/Probation Info tab - Update Contract page

14. Complete the fields as follows:

Name	This field is populated with the person's name.
Person ID	This field is populated with the person ID.
Contract Number	This field is populated based on the selection made on the Contract Status/Content tab ( <b>Figure 64</b> ).
Begin Date	This field is populated based on the selection made on the Contract Status/Content tab ( <b>Figure 64</b> ).
Contract Status	This field is populated based on the selection made on the Contract Status/Content tab ( <b>Figure 64</b> ).
Effective Date	This field is populated.
Empl Rcd#	This field is populated.

<b>Job Indicator</b>	This field is populated.
<b>Action</b>	This field is populated.
<b>Reason</b>	This field is populated.
<b>Company</b>	This field is populated.
<b>Pay Group</b>	This field is populated.
<b>Work Period</b>	This field is populated.
<b>Std Hrs</b>	This field is populated.
<b>Business Unit</b>	This field is populated.
<b>Hourly Rate</b>	This field is populated.
<b>Department</b>	This field is populated.
<b>Reg/Temp</b>	This field is populated.
<b>Monthly Rate</b>	This field is populated.
<b>Location</b>	This field is populated.
<b>Labor Agreement</b>	This field is populated.
<b>Annual Rate</b>	This field is populated.
<b>Reg Region</b>	This field is populated.
<b>Category</b>	This field is populated.
<b>Signature Date</b>	Enter the signature date or select a date by clicking the calendar icon.

<b>Minimum Hours</b>	Enter the minimum number of hours.
<b>Maximum Hours</b>	Enter the maximum number of hours.
<b>Responsible ID</b>	Enter the responsible ID or select an ID by clicking the search icon.
<b>Probation Date</b>	Enter the probation date or select a date by clicking the calendar icon.
<b>Reason</b>	Select a reason from the drop-down menu. The valid values are <b>New Date Needed</b> and <b>Unsatisfactory Performance</b> .

15. At this point the following options are available:

Step	Description
Click <b>Save</b>	
Click <b>Notify</b>	
Click <b>Previous Tab</b>	
Click <b>Add</b>	
Click <b>Update Display</b>	
Click <b>Include History</b>	
Click <b>Correct History</b>	

## Define Contract Types

1. Select the **Workforce Administration** menu group.
2. Select the **Job Information** menu.
3. Select the **Contract Administration** menu item.
4. Select the **Define Contract Types** component. The Find an Existing Value tab - Define Contract Types page (Figure 67) is displayed.



**Define Contract Types**  
Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value** **Add a New Value**

**SetID:** begins with

**Contract Type:** begins with

☐ **Include History** ☐ **Correct History**

**Search** **Clear** [Basic Search](#) [Save Search Criteria](#)

[Find an Existing Value](#) | [Add a New Value](#)

**Figure 67. Find an Existing Value tab - Define Contract Types page**

- Complete the fields as follows:

**SetID** Enter the SetID or select an ID by clicking the search icon.

**Contract Type** Enter the contract type

**Include History** Check this box if applicable.

**Correct History** Check this box if applicable.

- Click **Search** to search for the values entered.

**OR**


Click **Clear** to clear all entries.

**OR**

- Click the **Add A New Value** tab. The Add A New Value tab - Define Contract Types page (**Figure 68**) is displayed.

**Define Contract Types**

[Find an Existing Value](#) **Add a New Value**

**SetID:**  

**Contract Type:**

**Add**

[Find an Existing Value](#) | [Add a New Value](#)

**Figure 68. Add a New Value tab - Define Contract Types page**

8. Complete the fields as follows:

**SetID** Enter the setID or select an ID by clicking the search icon.

**Contract Type** Enter the contract type.

9. Click **Add**. The Contract Type Table page (**Figure 69**) is displayed.

Figure 69. Contract Type Table page

10. Complete the fields as follows:

<b>SetID</b>	This field is populated with the search criteria entered or selected.
<b>Contract Type</b>	This field is populated with the search criteria entered or selected.
<b>Effective Date</b>	Enter the effective date or select a date by clicking the calendar icon.
<b>Status</b>	Select the status from the drop-down menu. The valid values are <b>Active</b> and <b>Inactive</b> .
<b>Description</b>	Enter the description
<b>Short Description</b>	Enter the short description.

11. At this point the following options are available:

Step	Description
Click <b>Save</b>	
Click <b>Notify</b>	

Step	Description
Click <b>Add</b>	
Click <b>Update Display</b>	
Click <b>Include History</b>	
Click <b>Correct History</b>	

## Define Contract Clauses

1. Select the **Workforce Administration** menu group.
2. Select the **Job Information** menu.
3. Select the **Contract Administration** menu item.
4. Select the **Define Contract Clauses** component. The Find an Existing Value tab - Define Contract Clauses page (**Figure 70**) is displayed.

**Define Contract Clauses**  
Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value** **Add a New Value**

Contract Clause: begins with

Description: begins with

☐ Include History ☐ Correct History ☐ Case Sensitive

[Basic Search](#) [Save Search Criteria](#)

[Find an Existing Value](#) | [Add a New Value](#)

**Figure 70. Find an Existing Value tab - Define Contract clauses page**

5. Complete the fields as follows:

<b>Contract Clause</b>	Enter the contract clause.
<b>Description</b>	Enter the description.
<b>Include History</b>	Check this box if applicable.

**Correct History** Check this box if applicable.

**Case Sensitive** Check this box if applicable.

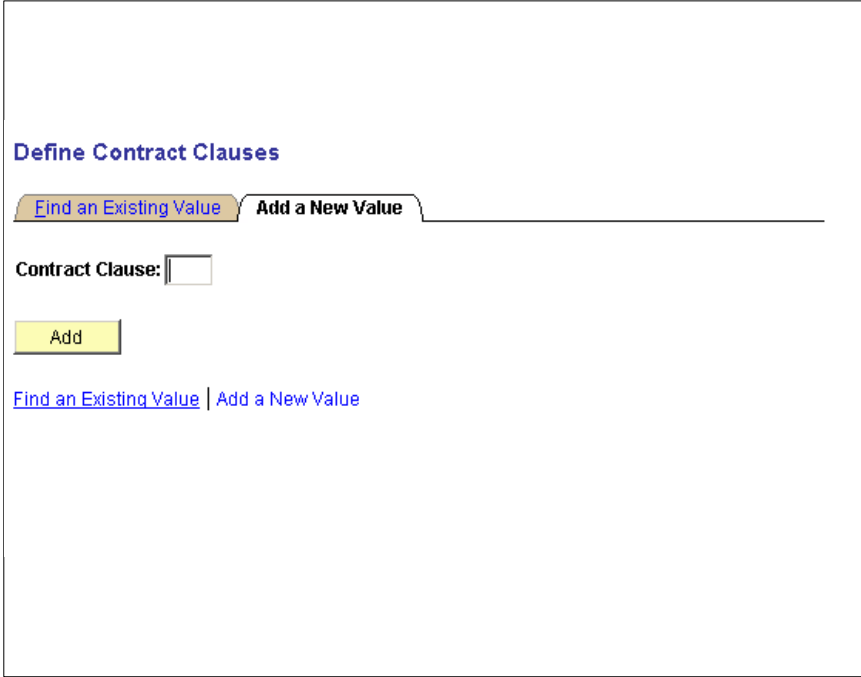
6. Click **Search** to search for the values entered. Select the applicable value. The Contract Clause Table tab - Define Contract Clauses page (**Figure 72**) is displayed.

**OR**

Click **Clear** to clear all entries.

**OR**

Click the **Add a New Value** tab. The Add a New Value tab - Define Contract Clauses page (**Figure 71**) is displayed.



The screenshot shows a web interface titled "Define Contract Clauses". Below the title are two tabs: "Find an Existing Value" and "Add a New Value". The "Add a New Value" tab is selected. Below the tabs is a text input field labeled "Contract Clause:". Below the input field is a yellow "Add" button. At the bottom of the form area, there are two links: "Find an Existing Value" and "Add a New Value".

**Figure 71. Add a New Value tab - Define Contract Clauses page**

7. Complete the field as follows:

**Contract Clause** Enter the contract clause.

8. Click **Add** to add the new value entered. The Contract Clause Table tab - Define Contract Clauses page (**Figure 72**) is displayed.

Contract Clause Table

Contract Clause:004

Find | View AllFirst1 of 1Last

\*Effective Date:01/01/1900

\*Status:Active

\*Description:Traveling Required

Short Description:Traveling

Long Description:Traveling Required

Comment:Traveling Required

Save

Return to Search

Previous in List

Next in List

Notify

Add

Update/Display

Include History

Correct History

Figure 72. Contract Clause Table tab - Define Contract Clauses page

9. Complete the fields as follows:

- Contract Clause

This field is populated with the search criteria entered or selected.
- Effective Date

Enter the effective date or select a date by clicking the calendar icon.
- Status

Select the status from the drop-down menu. The valid values are **Active** and **Inactive**.
- Short Description

Enter the short description.
- Long Description

Enter the long description.
- Comment

Enter the applicable comments.

10. At this point the following options are available:

Step	Description
Click <b>Save</b>	
Click <b>Return to Search</b>	
Click <b>Previous in List</b>	

Step	Description
Click <b>Next in List</b>	
Click <b>Notify</b>	
Click <b>Add</b>	
Click <b>Include History</b>	
Click <b>Correct History</b>	

## Define Contract Templates

1. Select the **Workforce Administration** menu group.
2. Select the **Job Information** menu.
3. Select the **Contract Administration** menu item.
4. Select the **Define Contract Templates** component. The Find an Existing Value tab - Define Contract Templates page (**Figure 73**) is displayed.

**Define Contract Templates**  
Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value** **Add a New Value**

SetID: begins with [ ] [ ]

Contract Template ID: begins with [ ] [ ]

Description: begins with [ ] [ ]

Contract Family: = [ ] [ ]

☐ Include History ☐ Correct History ☐ Case Sensitive

**Search** **Clear** [Basic Search](#) [Save Search Criteria](#)

[Find an Existing Value](#) | [Add a New Value](#)

**Figure 73. Find an Existing Value tab - Define Contract Templates page**

5. Complete the fields as follows:

**SetID** Enter the SetID or select an ID by clicking the search icon.

**Contract Template ID** Enter the contract template ID.

<b>Description</b>	Enter the description.
<b>Contract Family</b>	Select the contract family from the drop-down menu. The valid values are <b>Regular</b> and <b>Temporary</b> .
<b>Include History</b>	Check this box if applicable.
<b>Correct History</b>	Check this box if applicable.
<b>Case Sensitive</b>	Check this box if applicable.

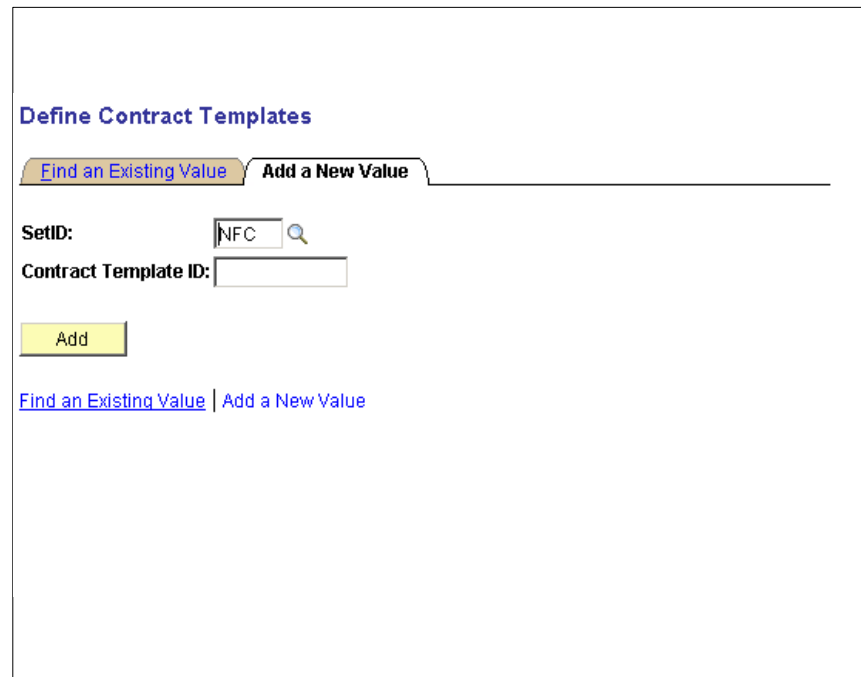
- Click **Search** to search for the values entered. Select the applicable value. The Contract Template Table page (**Figure 75**) is displayed.

OR

Click **Clear** to clear all entries.

OR

Click the **Add a New Value** tab. The Add a New Value tab - Define Contract Templates page (**Figure 74**) is displayed.



The screenshot shows the 'Define Contract Templates' page with the 'Add a New Value' tab selected. The 'SetID' field contains 'NFC' and has a search icon. Below it is the 'Contract Template ID' field. An 'Add' button is visible. At the bottom, there are links for 'Find an Existing Value' and 'Add a New Value'.

**Figure 74. Add A New Value tab - Define Contract Templates page**

- Complete the fields as follows:

<b>SetID</b>	Enter the setID or select an ID by clicking the search icon.
--------------	--



**Contract Template ID** Enter the contract template ID.

8. Click **Add** to add the new value entered. The Contract Template Table page (**Figure 75**) is displayed.

**Contract Template Table**

Contract Template ID: CCB001 SetID: COMMN

**Contract Template** Find | View All First 1 of 1 Last

\*Effective Date: 01/01/1900 \*Status: Active

\*Description: Regular Hiring Contract

Short Description: Hiring

Contract Type: CDD

\*Contract Family: Regular

Contract Content: In this Agreement, the party who is receiving the job shall be referred to as "Employee", and the party who will be providing the job shall be referred to as "Company".

**Contract Clauses** Customize | Find | View All First 1 of 1 Last

*Sequence	*Contract Clause	Description	Clause Status
1			

**Contract Task Orders** Find | View All First 1 of 1 Last

Task Order #:

Begin Date:

End Date:

Description:

Comments:

Save Return to Search Previous in List Next in List Notify Add Update/Display Include History Correct History

Figure 75. Contract Template Table page

9. Complete the fields as follows:

**Contract Template ID** This field is populated with the search criteria entered or selected.

**SetID** This field is populated with the search criteria entered or selected.

**Effective Date** Enter the effective date or select a date by clicking the calendar icon.

**Status** Select the status from the drop-down menu. The valid values are **Active** and **Inactive**.

**Description** Enter the description.

**Short Description** Enter the short description.

<b>Contract Type</b>	Enter the contract type or select a type by clicking the search icon.
<b>Contract Family</b>	Select the contract family from the drop-down menu. The valid values are <b>Regular</b> and <b>Temporary</b> .
<b>Contract Content</b>	Enter the applicable contract content.
<b>Sequence</b>	Enter the sequence number.
<b>Contract Clause</b>	Enter the contract clause or select a clause by clicking the search icon.
<b>Description</b>	This field is populated based on the contract clause entered or selected.
<b>Clause Status</b>	Select the clause status from the drop-down menu. The valid values are <b>Optional</b> and <b>Required</b> .
<b>Task Order #</b>	Enter the task order number.
<b>Begin Date</b>	Enter the begin date or select a date by clicking the calendar icon.
<b>End Date</b>	Enter the end date or select a date by clicking the calendar icon.
<b>Description</b>	Enter the description.
<b>Comments</b>	Enter the applicable comments.

10. At this point the following options are available:

Step	Description
Click <b>Save</b>	
Click <b>Notify</b>	
Click <b>Add</b>	
Click <b>Update Display</b>	
Click <b>Include History</b>	
Click <b>Correct History</b>	

## Service Agreements USF

1. Select the **Workforce Administration** menu group.
2. Select the **Job Information** menu.
3. Select the **Contract Administration** menu item.
4. Select the **Service Agreements USF** component. The Find an Existing Value tab - Service Agreements USF page (**Figure 76**) is displayed.

**Service Agreements USF**

Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value**

**Search by:**  begins with

[Advanced Search](#)

**Figure 76. Find an Existing Value tab - Service Agreements USF page**

### Search By

Select the applicable value to search by from the drop-down menu. The valid values are:

#### Search By Valid Values

Alternate Character Name  
Empl Rcd Nbr  
EmplID  
Last Name  
Middle Name  
Name  
Second Name

### Begins With

Enter the applicable value based on the search criteria selected.

5. Click **Search**. The Service Agreements tab - Service Agreements USF page (**Figure 77**) is displayed.

Service Agreements

test last nameEMPID: 180640Empl Rcd #: 0

Service AgreementsFind | View AllFirst1 of 1Last

'Service Agreement'

Type:

Effective Date:

End Date:

SaveReturn to SearchNotify

Figure 77. Service Agreements tab - Service Agreements USF page

6. Complete the fields as follows:

- Name

This field is populated.
- ID

This field is populated
- Empl Rcd #

This field is populated.
- Service Agreement Type

Select the service agreement type from the drop-down menu. The valid values are Long Term Training, Recruitment Bonus, and Relocation Bonus.
- Effective Date

Enter the effective date or select a date by clicking the calendar icon.
- End Date

Enter the end date or select a date by clicking the calendar icon.

7. At this point the following options are available:

Step	Description
Click <b>Save</b>	
Click <b>Return To Search</b>	
Click <b>Notify</b>	

## Configure Checklist

Configure checklist allows the user to establish checklists that can be assigned to employees, contingent workers and person(s) of interest.

1. Select the **Set Up HRMS** menu group.
2. Select the **Common Definitions** menu.
3. Select the **Checklists** menu item.
4. Select the **Checklist** component. The Find an Existing Value tab - Service Agreements USF page (**Figure 78**) is displayed.

**Checklist**  
Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value** [Add a New Value](#)

Checklist Code:

Description:

Checklist Type:

☐ Include History ☐ Correct History ☐ Case Sensitive

[Basic Search](#)

[Find an Existing Value](#) | [Add a New Value](#)

**Figure 78. Find An Existing Value tab - Checklist page**

5. Complete the fields as follows:

**Checklist Code** Enter the checklist code.

**Description** Enter the description.

<b>Checklist Type</b>	<p>Select the checklist type from the drop-down menu. The valid values are:</p> <p><b>Checklist Type Valid Values</b></p> <p>Hiring</p> <p>Medical</p> <p>Organizational Instance</p> <p>Other</p> <p>Termination</p> <p>Training</p> <p>Transfer</p>
<b>Include History</b>	Check this box if applicable.
<b>Correct History</b>	Check this box if applicable.
<b>Case Sensitive</b>	Check this box if applicable.

6. Click **Search**. Select the applicable value. The Checklist Table page (**Figure 80**) is displayed.

**OR**

Click **Clear** to clear the entries.

**OR**

Click the **Add A New Value** tab. The Add A New Value tab - Checklist page (**Figure 79**) is displayed.

The screenshot shows a web interface titled "Checklist". At the top, there are two tabs: "Find an Existing Value" and "Add a New Value". The "Add a New Value" tab is currently selected. Below the tabs, there is a label "Checklist Code:" followed by a text input field. Underneath the input field is a yellow button labeled "Add". At the bottom of the form, there are two links: "Find an Existing Value" and "Add a New Value".

**Figure 79. Add A New Value tab - Checklist page**

7. Complete the field as follows:

**Checklist Code**                      Enter the checklist code to be added.

8. Click **Add** to add the new checklist code. The Checklist Table page (**Figure 80**) is displayed.

Checklist Table

Checklist Code: 102

Checklist Item

Find | View All

First 1 of 1 Last

Effective Date: 08/13/2009

Status: Active

Checklist Type:

Description:

Short Description:

Assignment Checklist Item

Customize | Find

First 1 of 1 Last

Sequence

Item Code

1 100

Save

Notify

Add

Update/Display

Include History

Correct History

Figure 80. Checklist Table page

9. Complete the fields as follows:

- Checklist Code

This field is populated with the search criteria entered or selected.
- Effective Date

Enter the effective date or select a date by clicking the calendar icon.
- Status

Select the status from the drop-down menu. The valid values are **Active** and **Inactive**.
- Checklist Type

Select the checklist type from the drop-down menu. The valid values are:  
**Checklist Type Valid Values**  
**Hiring**  
**Medical**  
**Organizational Instance**  
**Other**  
**Termination**  
**Training**  
**Transfer**
- Description

Enter the description.



<b>Short Description</b>	Enter the short description.
<b>Sequence</b>	This field is populated.
<b>Item Code</b>	Enter the item code or select a code by clicking the search icon.

10. At this point the following options are available:

Step	Description
Click <b>Save</b>	
Click <b>Notify</b>	
Click <b>Add</b>	
Click <b>Update Display</b>	
Click <b>Include History</b>	
Click <b>Correct History</b>	

## Configure Person of Interest Types

This component allows users to establish POI types that can be associated with person(s) of interest that will be maintained in *EmpowHR*.

1. Select the **Set Up HRMS** menu group.
2. Select the **Foundation Tables** menu.
3. Select the **Organization** menu item.
4. Select the **Person of Interest Types** component. The Find an Existing Value tab - Person of Interest Types page (**Figure 81**) is displayed.

**POI Type**  
Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value** **Add a New Value**

**Person of Interest Type:** begins with

**Description:** begins with

☐ **Case Sensitive**

**Search** **Clear** [Basic Search](#) [Save Search Criteria](#)

[Find an Existing Value](#) | [Add a New Value](#)

**Figure 81. Find an Existing Value tab - POI Type page**

5. Complete the fields as follows:

**Person of Interest Type** Enter the person of interest type.

**Description** Enter the description.

**Case Sensitive** Check this box if applicable.

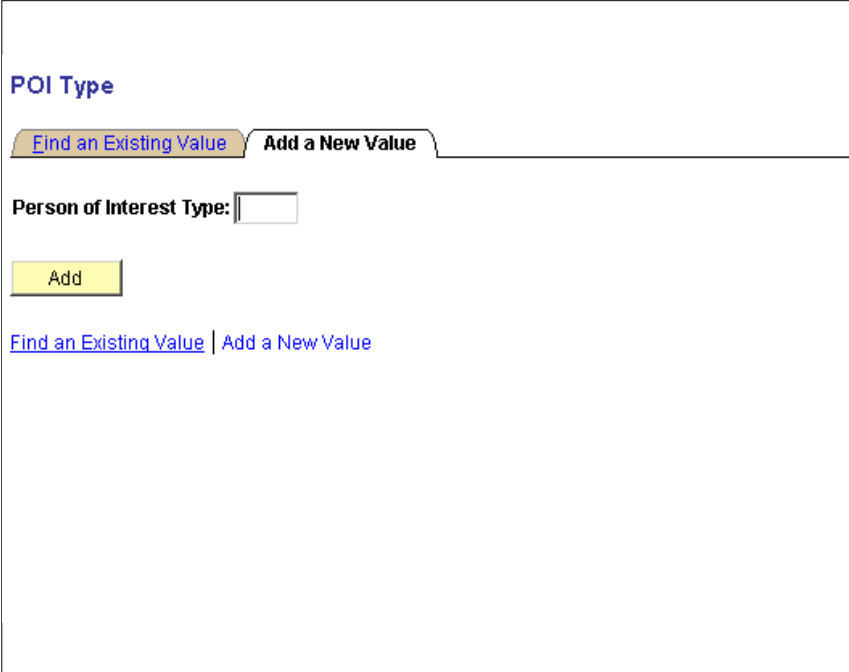
6. Click **Search** to search for the values entered. Select the applicable value. The Person of Interest Type Table tab - POI Type page (**Figure 83**) is displayed.

OR

Click **Clear** to clear the entries.

**OR**

Click the **Add A New Value** tab. The Add A New Value tab - POI Type page (**Figure 82**) is displayed.



The screenshot shows a web interface titled "POI Type". Below the title are two tabs: "Find an Existing Value" and "Add a New Value". The "Add a New Value" tab is selected. Below the tabs is a label "Person of Interest Type:" followed by a text input field. Below the input field is a yellow "Add" button. At the bottom of the form area, there are two links: "Find an Existing Value" and "Add a New Value".

**Figure 82. Add A New Value tab - POI Type page**

7. Complete the field as follows:

**Person of Interest Type** Enter the person of interest type to be added.

8. Click **Add**. The Person of Interest Type Table tab - POI Type page (**Figure 83**) is displayed.

Person of Interest Type Tbl

Person of Interest Type:

00011

'Effective Status:

Active

Description:

Short Description:

☐ Job Record Required?

POI Transaction

Record for POI Transaction:

Component Name:

Market:

Menu Name:

Menu Bar Name:

Menu Item Name:

Transfer Panel Name:

Usage of this POI Type

Record for POI Summary View:

Person of Interest Checklist:

☒ Allow in Generic Add Component

☒ Allow in Generic Upd Component

Comment:

Save

Add

Update/Display

Figure 83. Person of Interest Type Table tab - POI Type page

9. Complete the fields as follows:

Person of Interest Type	This field is populated with the search criteria entered or selected.
Effective Status	Select the effective status from the drop-down menu. The valid values are <b>Active</b> and <b>Inactive</b> .
Description	Enter the description.
Short Description	Enter the short description.
Job Record Required	Check this box if applicable.
Record for POI Transaction	Enter the record for POI transaction or select a record by clicking the search icon.
Component Name	Enter the component name or select a name by clicking the search icon.
Market	Enter the market or select a market by clicking the search icon.

<b>Menu Name</b>	Enter the menu name.
<b>Menu Bar Name</b>	Enter the menu bar name.
<b>Menu Item Name</b>	Enter the menu item name.
<b>Transfer Panel Name</b>	Enter the transfer panel name.
<b>Record for POI Summary View</b>	Enter the record for POI summary view or select a record by clicking the search icon.
<b>Person of Interest Checklist</b>	Enter the person of interest checklist or select a checklist by clicking the search icon.
<b>Allow in Generic Add Component</b>	Check this box if applicable.
<b>Allow in Generic Upd Component</b>	Check this box if applicable.
<b>Comment</b>	Enter the applicable comments.

10. At this point the following options are available:

Step	Description
Click <b>Save</b>	
Click <b>Add</b>	
Click <b>Update Display</b>	

## Search for Matching Persons

11. Click the **Search for Matching Persons** link. The Search Criteria page (**Figure 84**) is displayed.

Search Fields	Value
Address Line 1	
City	
First Name Search	
Last Name Search	
Date of Birth	
Gender	
National Id	

Search Order	Description
10	Name,Addr,City,Bday,Gender,NID
20	NID Only
30	Name,Bday,Gender
40	Name,Gender
50	Name Only

Figure 84. Search Criteria page

12. Complete the fields as follows:

Search Type	This field is populated.
Ad Hoc Search	This box defaults to being unchecked and cannot be modified.
Search Parameter	This field is populated with the guidelines of the search and cannot be modified.
Search Result Code	Enter the applicable search code or select a code by clicking the search icon.
Address Line 1	Enter the address.
City	Enter the city.
First Name Search	Enter the first name.

<b>Last Name Search</b>	Enter the last name.
<b>Date Of Birth</b>	Enter the date of birth or select a date by clicking on the calendar icon.
<b>Gender</b>	Enter the gender information.
<b>National ID</b>	Enter the national ID.
<b>Search By Order Number/Search Order</b>	This field is populated.
<b>Search By Order Number/Description</b>	This field is populated with the description of the corresponding search order.

13. At this point the following options are available:

Step	Description
Click <b>Search</b>	To search based on the criteria entered.
Click <b>Clear All</b>	To clear all prior entries on this page.
Click <b>Selective Search</b>	To narrow down the search criteria for the category selected.

# Add a Name

**Add Name:**

- 1. Click the **Add Name** link. The Edit Name page (**Figure 85**) is displayed.

Edit Name

English Name Format

Prefix:

First Name:

Middle Name:

Last Name:

Suffix:

Refresh Name

Display Name:

Formal Name:

Name:

OK

Cancel

Refresh

**Figure 85. Edit Name page**

- 2. Complete the fields as follows:

**Prefix**

Select the applicable prefix from the drop-down menu.  
The valid values are as follows:

Prefix Valid Values
Dr
Miss
Mr
Mrs
Ms

**First Name**

Enter the first name.

**Middle Name**

Enter the middle name.

**Last Name**

Enter the last name.



**Suffix**

Select the applicable suffix from the drop-down menu.  
Valid values are as follows:

Suffix Valid Values
III
Junior
Senior

3. Click **Refresh Name**. The information entered on the Edit Name page is displayed in the corresponding fields.

**Display Name**

This field is populated with the information entered in the fields above.

**Formal Name**

This field is populated with the information entered in the fields above.

**Name**

This field is populated with the information entered in the fields above.

# Add Address Detail

## Adding Address Detail:

1. Click the **Add Address Detail** link. The Address History page (Figure 86) is displayed.

Address History

Address Type: Home

*Effective Date	Country	*Status	Address:
03/19/2009	USA	A	

[Add Address](#)

OK Cancel Refresh

Figure 86. Address History page

2. Complete the fields as follows:

Address Type	This field is populated.
*Effective Date	Enter the effective date or select a date by clicking on the calendar icon.
Country	Enter the country or select a country by clicking on the search icon.
*Status	Enter the status or select a status by clicking on the search icon.
Address	This field is populated with information from the <b>Add Address</b> link. Refer to field instructions below.

# Add Address

**Add Address:**

- 1. Click the **Add Address** link. The Edit Address page (**Figure 87**) is displayed.

Edit Address

Country:United States

Address 1:

Address 2:

Address 3:

City:State:Postal:

County:

OK

Cancel

**Figure 87. Edit Address page**

- 2. Complete the fields as follows:

<b>Country</b>	Enter the country or select a country by clicking on the search icon.
<b>Address 1</b>	Enter the first line of the address.
<b>Address2</b>	Enter the second line of the address if applicable.
<b>Address 3</b>	Enter the third line of the address if applicable.
<b>City</b>	Enter the city.
<b>State</b>	Enter the state or select a state by clicking on the search icon.
<b>Postal</b>	Enter the postal code.

**County**

Enter the county

3. Click **OK**. The information entered is saved and the Address History page (**Figure 86**) is displayed.

**OR**

Click **Cancel**. The information entered is not saved and the Address History page (**Figure 86**) is displayed.

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